



Third 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

June 9, 2022

Agenda

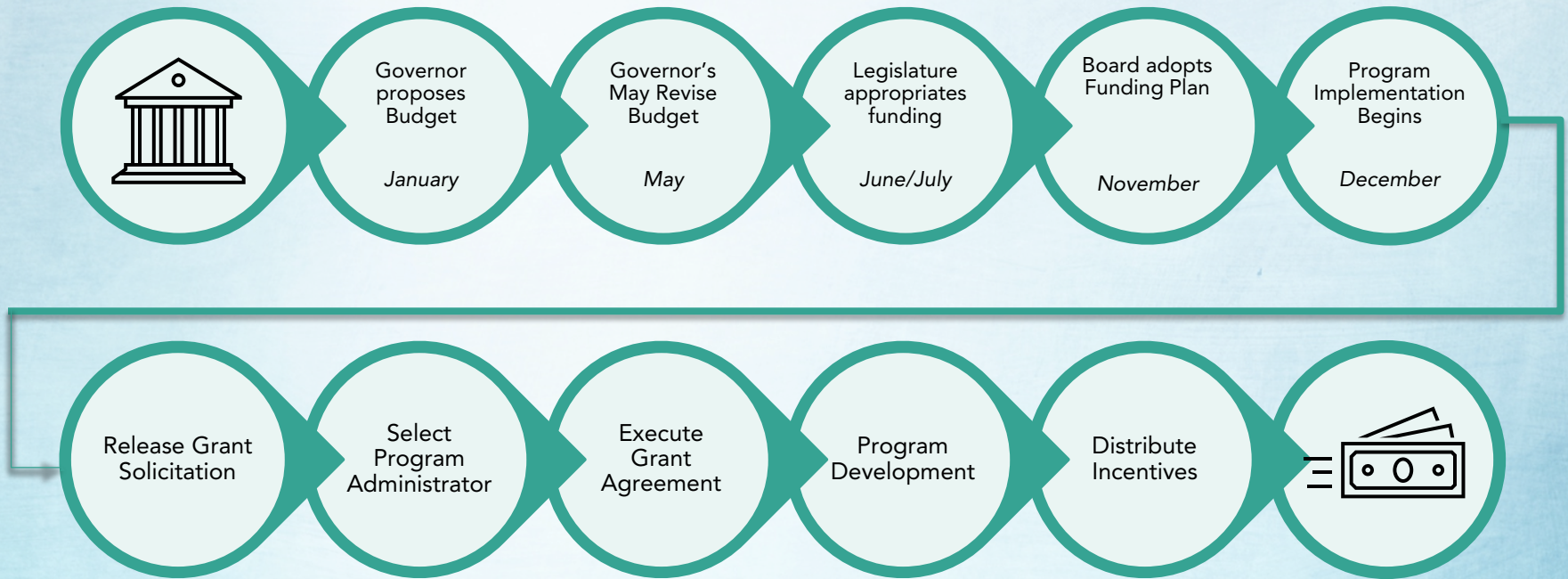
Topic
Welcome and Introductions
Funding Plan for Clean Transportation Incentives Timeline and Process
Work Group Purpose and Focus
Mobility Long-term Plan Overview
Recap of Past Discussions and Feedback
Evaluation of Investment Progress and Benefits
Mobility Program Updates
Comments and Questions
Revised Long-Term Plan Proposal
Comments and Questions
Next Steps



Welcome and Introductions

Funding Plan for Clean Transportation Incentives Timeline and Process

Funding Timeline



How Can I Participate?



Kick-off Workshop
March 2022

Broad, high-level discussion on Governor's proposed budget, Funding Plan process, and program updates



Workgroup Meetings
March – June 2022

Project specific discussions on proposed funding allocations and program changes



Final Workshop
July 21, 2022

Discuss staff's draft proposals for the Funding Plan



Public Comment Period

October 7 – November 7, 2022

Submit written comments on Funding Plan through California Air Resources Board (CARB) online portal



Board Hearing
November 17-18, 2022

Board considers staff's proposal and listens to public testimony prior to adopting Funding Plan

One-on-one Meetings

Request meetings with California Air Resources Board to discuss a specific topic or variety of topics



Community Engagement Meetings

Targeted meetings with community groups to discuss community-identified topics

Work Group Purpose and Focus

Work Group Purpose

- Provide an overview of long-term plan development
- Recap previous public work groups and stakeholder discussions
- Highlight investment benefits and gaps
- Share methodologies for measuring and tracking socioeconomic benefits
- Discuss the May Revision to the Governor's Proposed Budget and provide an updated proposal to implement mobility funding

Work Group Focus

- Specific refinements to CARB's clean mobility long-term plan proposal based on the May Revised Budget
 - Address stakeholder questions and comments
- Stakeholder feedback and discussion, including on:
 - Funding splits
 - Funding priorities and focus

Mobility Long-Term Plan Overview

Mobility Long-Term Plan Overview

- CARB to develop a long-term plan for clean mobility investments pursuant to Senate Bill (SB) 1275
 - Includes vehicle purchase incentives and the zero-emission vehicle (ZEV) market
- Kick-off meeting February 17 set the stage for long-term plan development
- Second meeting April 19 provided the long-term plan proposal
- **Today:** updated long-term plan proposal and discussion

Governor's May 2022 Revised Budget

- Budget changed from \$65 million in current year to \$419 million as part of the acceleration package proposal
- \$419 million for mobility projects to Fiscal Year (FY) 2021-22 budget to accelerate funds into communities:
 - Minimum \$110 million for Clean Mobility Options*
 - Minimum \$122 million for Clean Mobility in Schools*
 - \$187 million not project specific – discretion for splits through Funding Plan process (see next slide)

* Specific line items included in the May 2022 Revised Budget

Staff's Proposed Project Funding Splits

Project Type	\$419 million in Total Funding*
Clean Mobility Options	\$126 million
Clean Mobility in Schools	\$125 million
Sustainable Transportation Equity Project	\$125 million
Planning and Capacity Building Grants	\$43 million

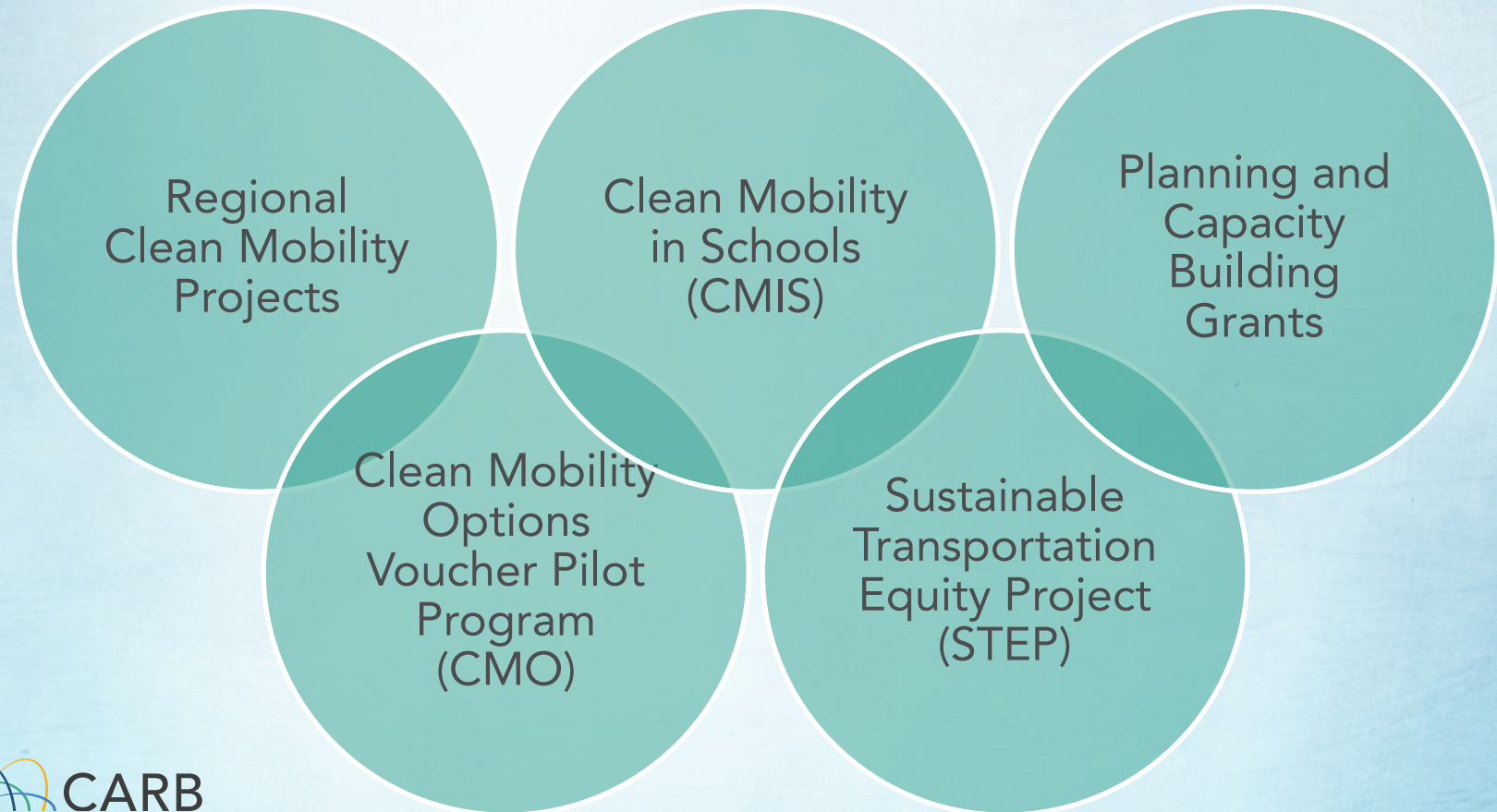
*Up to 1 percent may be used for State Operations

Discussion Questions

- Are staff's proposed funding splits sensible based on the May 2022 Revised Budget acceleration to FY 2021-22?
- Are there project elements that need to be prioritized in order to maximize community benefits?

Recap of Past Discussions and Feedback

Clean Mobility Projects



Links to Clean Mobility Investments

Projects:

Low Carbon Transportation Investments Projects in Action

- CMO
- CMIS
- STEP

User Information:

Clean Mobility User Information

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

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

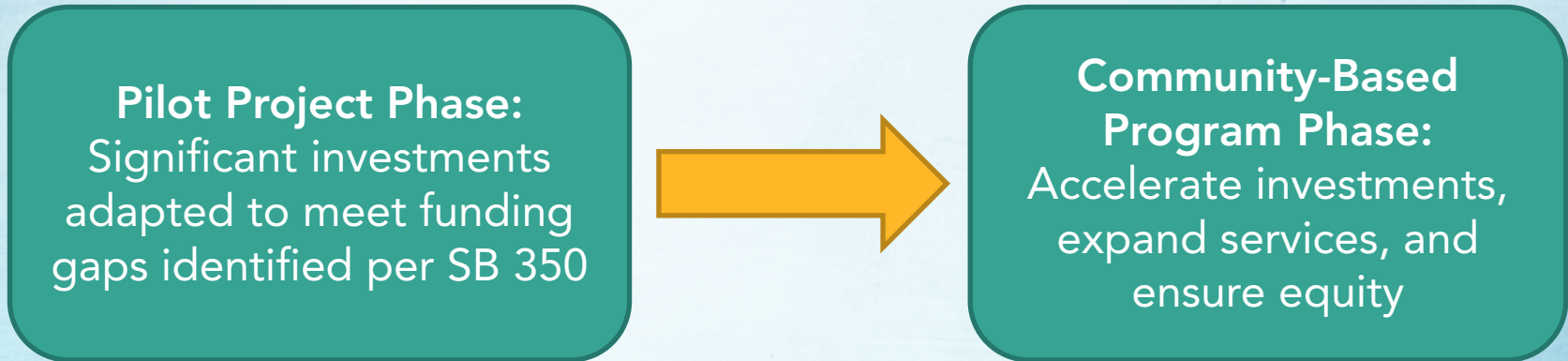
Prioritize investment
in underserved
communities

Balance
investments
geographically

Make opportunities for
new communities to
access funding

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



Importance of Addressing Mobility Investment Gaps

- Critical to long-range investment planning
- Raised at all work groups and in stakeholder discussions
- Feedback focused on needs of Black communities, other communities of color, tribal governments, and rural areas
- Continue to welcome additional suggestions, including investments leveraging existing projects

Considerations for Guiding Mobility Investments

- Strong stakeholder support in April 19 meeting for an equity centered group to be formed that participates in project design, project selection and implementation
- Open to ideas on group structure and involvement
- Critical needs identified include:
 - Review equity across programs to allow for specific improvements
 - Document and report-out lessons learned in administering and implementing programs
 - Build on existing evaluations and research contracts

Discussion Questions

- Why are you here today?
- What clean mobility programs most interest you?
- Is there something specific CARB can do to support communities we have not invested in yet?
- How can CARB increase access to funding for African American communities and communities of color?

Evaluations of Investment Progress and Benefits

Key Mechanisms to Identify Metrics

- Metrics are critical to assessing investment progress
- This includes multiple layers of evaluation and investment assessments
 - CARB evaluations
 - Third-party evaluation contracts
 - Project Grantees and Program Administration
- Clean mobility services user surveys and focus groups done by project grantees
 - Working to align surveys across programs

CARB Evaluation of Program Outcomes and Community Benefits

- Measuring outcomes against investment objectives (increase access, reduce greenhouse gas and criteria pollutant emissions and vehicle miles traveled, etc.)
- Includes, but not limited to, review of:
 - Jobs supported by the project
 - Quantity of trips and number of users
 - Socioeconomic benefits and behavioral change
 - Community engagement and outreach

Tools Across Programs to Assess Use and User Benefits

- Vehicle telematics
- Voluntary participant surveys
- Employment and project outcomes
- Greenhouse gas emissions reductions and co-benefit quantification
- Socioeconomic benefit analysis

Examples of Vehicle Telematics Data

- Number of reservations
- Number of hours reserved
- Vehicle miles traveled
- Average vehicle utilization rate
- Fares or subsidy costs and quantities

Voluntary Participant Surveys

- Participants have been surveyed since FY 2014-15 when mobility investments began
- Critical in assessing project outcomes and benefits
- Provide CARB and program administrators with key data for project improvements
- Questions have been refined to better capture socioeconomic and other community benefits

Current Participant Survey Types

Goal: collect data in the short and long-term of mobility service use

- There are currently three types of surveys:
 1. Initial-Sign-up Survey
 2. Post-Trip Survey
 3. User Survey (6 months – 1 year)

*Note: survey information on the following slides is from **some** projects and not meant to reflect all current or future reporting activities*

Current Participant Survey Types (cont.)

1. Initial/Sign Up Survey

- Pre-project travel behavior (common modes used)
- Pre-project transportation challenges
- Example demographics:
 - Race
 - Gender
 - Age
 - Primary language spoken
 - Household income
 - Household size

Current Participant Survey Types (cont.)

2. Post-Trip Survey

- Rate the quality of the experience
- Trip purpose (e.g., grocery stores, medical appointments, recreational activities)
- Number of passengers
- Transportation choice if mobility service had not been available
 - Ability to take trip at all (trip may not have occurred without service)

Current Participant Survey Types (cont.)

3. User Survey

- Rate the overall quality of project services
- Suggestions for improvements
- Changes in travel behavior and vehicle ownership
- Changes/improvements in transportation access
- Changes in perception of clean technology vehicles/equipment

Current Participant Survey Types (cont.)

- CARB is open to feedback on additional questions and data we should be collecting across projects
- Survey refinements will continue to determine what data is most critical given the unique nature of projects
- CARB is working to align questions asked across programs to measure collective outcomes across our suite of investments

Grantee Activity and Outcome Reporting

- Surveys and focus group discussions
 - Provide feedback to CARB on challenges and lessons learned
- Document the number, nature and outcomes of outreach events
- Report telematics and survey results
- Annual reporting of jobs and greenhouse gas emissions
- Incorporate real-time user feedback to adaptively manage projects
- Costs of operations (e.g., capital costs, outreach, and maintenance)

Socioeconomic Benefit Analysis

- Clean mobility user focused
- Monetize socioeconomic benefits
- Including
 - Value of reliable, clean transportation
 - Cost savings relative to other options
- Valuation will capture more benefits than before
- Improved surveys and telematics will provide improved estimates of benefits

Third-Party Evaluations

- CARB to consider feedback on the importance of working directly with community-based and grassroots organizations
 - Including role of an Equity Advisory or similar group
- Reminder of current contracts:
 - University of California (UC) Berkeley Transportation Sustainability Research Center
 - UC Berkeley Othering and Belonging Institute (OBI)
 - Steer Group
 - UC Los Angeles Institute of Transportation Studies

Next Phase of Mobility Project Discussion

- Implementation design
 - Program work groups
 - Community-level considerations
- Continuously update evaluation methods to use existing and collected data to measure and report on each metric
- Ongoing identification of funding gaps
 - Build out mapping to assess investment opportunities

Discussion Questions

- Are there community specific evaluation measures or tools CARB should consider beyond what is currently being leveraged?



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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Mobility Program Updates

Regional Clean Mobility Projects

- Critical efforts are underway to maximize community benefits from investments
- Many projects require additional funding and support to become sustainable
 - \$10 million set aside from CMO to support this need
- Agricultural Worker Vanpools, ZEV Mobility, and Ecosystem of Shared Mobility projects final reporting is in progress which provides critical lessons
- BlueLA car share expansion will be underway this year increasing electric vehicles and mobility options
- Bay Area Car Sharing and Mobility Hubs project installed a bike storage room and anticipates launching car share services in San Jose and Richmond later this summer

Clean Mobility Options Voucher Pilot Program (CMO)



CMO Program Overview



Two types of Voucher Funding

- Mobility Project Voucher (MPV)
- Community Transportation Needs Assessment (CTNA) Voucher

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

Goal: Improve under resourced communities' access to clean mobility options that are safe, reliable, convenient, and affordable.

CMO Administrator Support for Building Community Capacity

- **One-on-One Assistance:** Targeted technical assistance
 - Pre-application, contracting, voucher redemption, project implementation, evaluation
- **Peer-to-Peer Exchange:** Small group discussions that yield meaningful results
 - Clean Mobility Equity Alliance (CMEA): 11 events, 20 organizations
- **Capacity Building Training:** Training on specific topics allow for broad dissemination and equal access to experts and materials
- **Capacity Building Tools:** Comprehensive library of guides, fact sheets, and templates that project teams can access on demand



Window 1 MPV Overview



Project locations: Clean Mobility Options – navigation

Amount Awarded	Number of Projects	Lead Applicant
<ul style="list-style-type: none">• \$20 million• Up to \$1 million per award	20 projects across 11 counties	<ul style="list-style-type: none">• 7 Nonprofits• 11 Public Agencies• 2 Tribal Governments

- All Vouchers have been executed
- 1 project has launched
- 9 more have started work



Window 1 CTNA Overview



Project locations: Clean Mobility Options – navigation

Amount Awarded	Number of Projects	Lead Applicant
<ul style="list-style-type: none">• \$1.15 million• Up to \$50,000 per award	24 assessment projects across 14 counties	<ul style="list-style-type: none">• 13 Nonprofits• 8 Public Agencies• 3 Tribal Governments

Awardees Community Engagement

- 10 Different Engagement Methods, including:
 - Online, In-Person, Door-to-Door, Public Events
- 37 Engagement Events with:
 - 2,736 Engagement Total Participants
 - 2,604 In-person (95%), 132 Online
- 5,161 Total Survey Responses

Awardees Satisfaction with Technical Assistance

- 85% of awardees satisfied with the overall process
- 87% felt they are now well prepared for implementation
- 80% were satisfied with technical assistance they received to complete their assessments

Key Lessons Learned from Window 1

- Application was too complex
- Too much pressure to submit in a timely manner
- Internet connectivity quality and access issue
- Some concerns about under-representation of lead applicants from marginalized communities and lower-capacity organizations
- Applicants invest a lot of time and resources creating applications with no assurance they would receive funding
- Some awardees dissatisfied with the voucher reimbursement process
 - Technical Assistance for voucher reimbursement was very helpful



Key Lessons Learned from Window 1 (cont.)

- Mobility projects take a lot of time, collaboration, and resources to design, develop, and launch
 - Building partnerships takes time and community capacity
 - Infrastructure takes time to install
 - Communities often cannot cover upfront capital costs
- Capital costs have increased substantially
- Insurance requirements are burdensome for communities and mobility providers



Improvements for Window 2

- CTNA voucher award is increased from \$50,000 to \$75,000 – is this enough?
- MPV application streamlined in two steps
- Existing CARB grantees will be now eligible to support existing services
- Eligible project areas are expanded to include all AB 1550 communities
- More time for awardees and partners to be deemed insurance compliant
- Allow full cost reimbursement for zero-emission medium-duty vehicles



Improvements for Window 2 (cont.)

- Equity Consultant is being brought on to support the Program Administrative Team
- Payment process will be streamlined
- Implementing other languages for CMO's website and tools, administrative personnel
- Expanding peer-to-peer learning opportunities and participation in the CMEA meetings to non-CMO grantees

Additional Improvements Proposed for Window 2

- Increase MPV voucher award from \$1 million to \$2.5 million with one additional year of funding for operations (2 years to 3 years)
 - Address significant rise in insurance costs, capital and operation costs, and supply chain constraints
- Increase vehicle and equipment voucher caps
- Lower insurance requirements for sub-contractors
- Consider different methods to provide additional support and funding for local community-based organizations and grassroots organizations
- Expand eligible service models to include traditional fixed-route for micro-transit services

Timeline and Potential Funding

- June 2022 – Opening of technical assistance and outreach window
- Late-Fall 2022 – Call for applications anticipated
- Potential funding based on May Revise Budget - \$147 million
 - Secured from previous fiscal years + California Energy Commission leveraged funding ~\$21 million
 - ZEV Package Accelerated Funding \$110 million
 - Staff proposing an additional \$16 million of \$419 million

Proposed Set-Asides and Potential New Funding Opportunities

- **Proposed set-asides to prioritize and accelerate funding to communities**
 - Current MPV funded projects – up to \$30 million
 - Window 1 CTNA recipients – up to \$25 million
 - Regional clean mobility projects – minimum \$10 million
 - Window 1 unfunded MPV applications – about \$23 million
 - Tribal Governments – about \$10 million
- **About \$25 million for new communities/projects**

Discussion Questions

- Are there any questions on CMO's proposed improvements for application window 2 or the timeline?



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Clean Mobility in Schools

- \$125 million to support a **new solicitation for new funds**
- **Tentative timeline**
 - Late 2022: Update solicitation via public process & select technical assistance provider
 - Early 2023: Application window opens
- Align requirements with STEP
- Funds **clean transportation and supporting projects**
 - ZEVs and equipment
 - Infrastructure and renewable energy projects
 - Active and alternative modes of transportation
 - Community engagement activities
- Open to California **public school districts** in low-income and disadvantaged communities



San Diego Unified School District, April 2022

Sustainable Transportation Equity Project

- \$125 million to support a **new solicitation** for Implementation Grants
- **Tentative timeline**
 - Late 2022: Update solicitation via public process & select technical assistance provider
 - Early 2023: Application window opens
- Align requirements with CMIS
- Funds **clean transportation and supporting projects**
- Open to local governments, community-based organizations, and tribal governments in **low-income and disadvantaged communities**



LADOT's Universal Basic Mobility Pilot press conference | Courtesy of LADOT

Discussion Questions

- What barriers need to be overcome for new communities to apply for CMO and the new CMIS and STEP solicitations?
- In addition to technical assistance for school districts, what specific needs should CARB consider for the new CMIS solicitation?
- Mobility investments are intended to be centered and community-driven. What specific steps can CARB take to ensure these investments meet those and reach communities that need them most?

Proposed Planning and Capacity Building Grants

- \$43 million to support community-driven projects and provide technical assistance
- Funding intended to address a broad range of community needs and barriers, including those not previously covered through existing programs
- Critical informing elements include:
 - Stakeholder feedback and lessons learned from equity pilots
 - Key findings and recommendations from OBI community-based transportation planning evaluation
- New competitive solicitation process or expand existing programs

Planning and Capacity Building Grant Funding Opportunities

- Could fund projects of varying scales based on needs, such as:
 - Community transportation needs and equity assessments
 - Community education, outreach, and engagement
 - Land use or transportation-focused plan development
 - Capacity building to implement new or enhance existing clean transportation planning, operations, or infrastructure projects
 - Job assistance and workforce development programs
- Provide technical assistance for application support and implementation of:
 - Planning and capacity building projects
 - Clean Mobility in Schools and STEP projects

What types of planning and capacity building projects should CARB fund?

Comments and Questions



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Revised Long-Term Plan Proposal

Proposed Long-Term Plan Strategy

- Measure 3-year demand pursuant to SB 1275
- Continue investing in CMO, CMIS, and STEP programs
- Expand scope of Planning and Capacity Building Grants
- Determine additional opportunities to support Sustainable Communities Strategy implementation
- Develop a methodology to determine program funding needed over the next 5, 10, or 20 years

Proposed Long-Term Plan Strategy (cont.)

- Conduct analysis of mobility project investment gaps to ensure overburdened communities have access to funding
- Provide updates to stakeholders based on feedback, analysis, and evaluations in the Funding Plan annually
- Continue funding current projects to help become sustainable in the long-term

Possible Methodologies to Address Long-term Funding Demand

- Previous solicitations demand
- Communities that have and have not received funding
 - Demographic analysis
 - Geographic analysis (rural, urban, tribal)
 - Other?
- Ensure existing vehicles/equipment and other investments are not left stranded

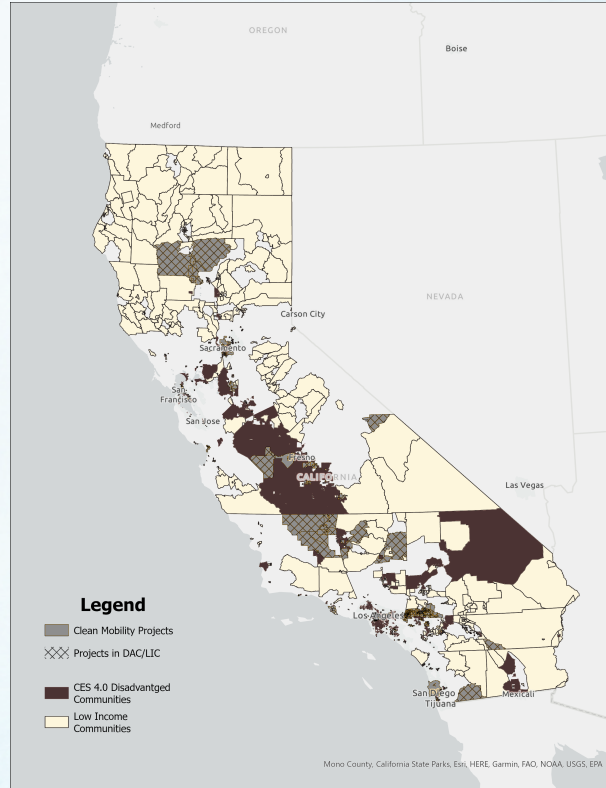
Current Analysis for Identifying Investment Gaps

- Analysis is ongoing to better understand investment gaps
- Initial results show more needs to be done to increase participation in Black and Asian American communities
 - Includes prioritizing dedicated outreach, planning, and capacity building
- More meaningful engagement with communities is critical
- Opportunities exist to simplify/streamline mobility funding

Identifying Funding Gaps Based on Census Tracts and Community Designations

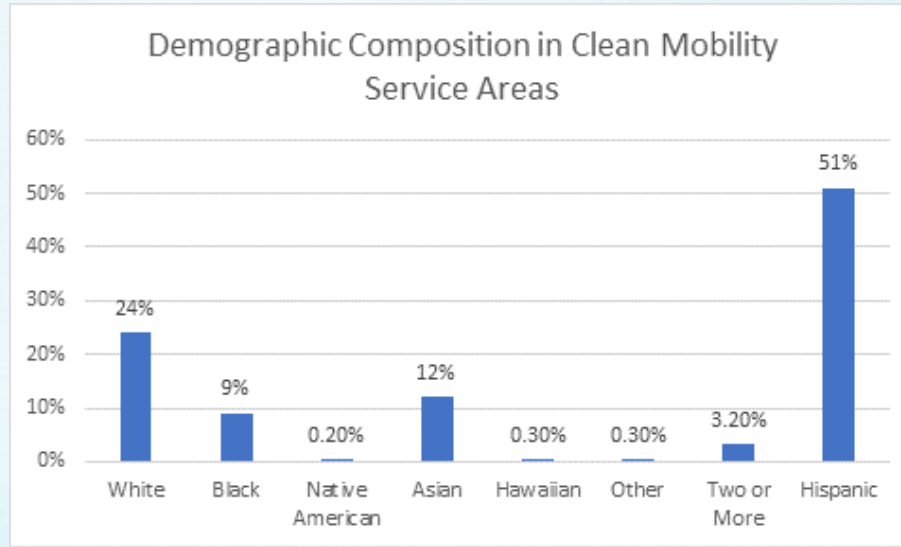
Clean Mobility Investment Gap Analysis				
Community Designation	Total Census Tracts	Census Tracts with Clean Mobility Projects	Population	Gap
SB 535 Disadvantaged Communities	1,985	809	3,840,830	60%
Assembly Bill (AB) 1550 Low Income Communities	2,748	928	4,332,893	67%

Identifying Gaps Based on CalEnviroScreen Community Designations



Identifying Gaps Based on Census Tract Demographics

- Discuss with grantees and communities to determine what methodology should be used to identify demographics mobility investments are currently serving
- Example of how data collected could be displayed – thoughts?



Discussion Questions

- What methodologies should be used to determine funding gaps for projections of future funding needs?
- What other ideas or suggestions do you have for identifying opportunities for future investments?

Comments and Questions



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Next Steps

Date*	Milestone
March-July	Various public meetings for the FY 2022-23 Funding Plan
July 21, 2022	Final Funding Plan Workshop
July – September 2022	Clean Mobility Implementation Work Group Meetings
Late-Fall 2022	CMO Window #2 Call for Applications
October 7, 2022	Release proposed 2022-23 Funding Plan with long-term plan appendix for consideration at late-2022 Board meeting
October 7, 2022 - November 7, 2022	Public comment period for the Funding Plan
November 17-18, 2022	FY 2022-23 Funding Plan Board Meeting
Early 2023	CMIS and STEP Application Windows Open

Contact Us

- **CARB Mobility Long-Term Plan Contacts:**
 - Ashley Georgiou, Ashley.Georgiou@arb.ca.gov
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- Direct outreach and engagement is welcome – we want to hear from you!
- Subscribe to GovDelivery
 - [California Air Resources Board \(govdelivery.com\)](http://govdelivery.com)

Adjourn

Thank you for participating!