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

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Welcome and Introductions
Funding Plan for Clean Transportation Incentives Timeline and Process
Governor proposes Budget
January

Governor’s May Revise Budget
May

Legislature appropriates funding
June/July

Board adopts Funding Plan
November

Program Implementation Begins
December

Release Grant Solicitation

Select Program Administrator

Execute Grant Agreement

Program Development

Distribute Incentives

CARB
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

<table>
<thead>
<tr>
<th>Project Type</th>
<th>$419 million in Total Funding*</th>
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<tbody>
<tr>
<td>Clean Mobility Options</td>
<td>$126 million</td>
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<tr>
<td>Clean Mobility in Schools</td>
<td>$125 million</td>
</tr>
<tr>
<td>Sustainable Transportation Equity Project</td>
<td>$125 million</td>
</tr>
<tr>
<td>Planning and Capacity Building Grants</td>
<td>$43 million</td>
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</table>

*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

- Regional Clean Mobility Projects
- Clean Mobility in Schools (CMIS)
- Clean Mobility Options Voucher Pilot Program (CMO)
- Sustainable Transportation Equity Project (STEP)
- Planning and Capacity Building Grants
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

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

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

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

<table>
<thead>
<tr>
<th>Two types of Voucher Funding</th>
<th>Capacity Building</th>
<th>Technical Assistance Support</th>
</tr>
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<tbody>
<tr>
<td>• Mobility Project Voucher (MPV)</td>
<td>• Toolkits and Resources</td>
<td>• 1:1 Individualized support</td>
</tr>
<tr>
<td>• Community Transportation Needs Assessment (CTNA) Voucher</td>
<td>• Peer exchange through the Clean Mobility Equity Alliance Network</td>
<td>• 1:1 Tribal technical assistance and support</td>
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**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

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

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<th>Amount Awarded</th>
<th>Number of Projects</th>
<th>Lead Applicant</th>
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<tr>
<td>$20 million</td>
<td>20 projects across 11 counties</td>
<td>7 Nonprofits</td>
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<tr>
<td>Up to $1 million per award</td>
<td></td>
<td>11 Public Agencies</td>
</tr>
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Project locations: Clean Mobility Options – navigation
Window 1 CTNA Overview

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

Project locations: Clean Mobility Options – navigation

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<tr>
<th>Amount Awarded</th>
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<th>Lead Applicant</th>
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<tr>
<td>$1.15 million</td>
<td>24 assessment projects across 14 counties</td>
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<tr>
<td>Up to $50,000 per award</td>
<td></td>
<td>13 Nonprofits</td>
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<tr>
<td></td>
<td></td>
<td>8 Public Agencies</td>
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<td></td>
<td></td>
<td>3 Tribal Governments</td>
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Amount Awarded: $1.15 million, up to $50,000 per award, projects across 14 counties; Number of Projects: 24; Lead Applicant: 13 Nonprofits, 8 Public Agencies, 3 Tribal Governments.
• 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?

  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.
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

Sustainable Transportation Equity Project (STEP) | California Air Resources Board
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

<table>
<thead>
<tr>
<th>Community Designation</th>
<th>Total Census Tracts</th>
<th>Census Tracts with Clean Mobility Projects</th>
<th>Population</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>SB 535 Disadvantaged Communities</td>
<td>1,985</td>
<td>809</td>
<td>3,840,830</td>
<td>60%</td>
</tr>
<tr>
<td>Assembly Bill (AB) 1550 Low Income Communities</td>
<td>2,748</td>
<td>928</td>
<td>4,332,893</td>
<td>67%</td>
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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

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<tr>
<th>Date*</th>
<th>Milestone</th>
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<tr>
<td>March-July</td>
<td>Various public meetings for the FY 2022-23 Funding Plan</td>
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<tr>
<td>July 21, 2022</td>
<td>Final Funding Plan Workshop</td>
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<tr>
<td>July – September 2022</td>
<td>Clean Mobility Implementation Work Group Meetings</td>
</tr>
<tr>
<td>Late-Fall 2022</td>
<td>CMO Window #2 Call for Applications</td>
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<tr>
<td>October 7, 2022</td>
<td>Release proposed 2022-23 Funding Plan with long-term plan appendix for consideration at late-2022 Board meeting</td>
</tr>
<tr>
<td>October 7, 2022 - November 7, 2022</td>
<td>Public comment period for the Funding Plan</td>
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<tr>
<td>November 17-18, 2022</td>
<td>FY 2022-23 Funding Plan Board Meeting</td>
</tr>
<tr>
<td>Early 2023</td>
<td>CMIS and STEP Application Windows Open</td>
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*Dates are subject to change. Please monitor CARB’s Meetings and Workshops page for more information.
Contact Us

• CARB Mobility Long-Term Plan 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 GovDelivery
  • California Air Resources Board (govdelivery.com)
Adjourn

Thank you for participating!