Clean Mobility Options Voucher Pilot

Transit Agencies & Schools Overview

Webinar
March 4, 2020
Today’s Agenda

1. Clean Mobility Options Voucher Pilot Overview and Project Criteria
2. Mobility Project Planning: Getting Ready to Apply
3. Project Models & Partnerships for Transit Agencies & Schools
4. Application Process and Components
5. Questions
Clean Mobility Options
Voucher Pilot Overview
What are the goals of this program?

Improve access to **clean mobility options** that are safe, reliable, convenient, and affordable to communities throughout California.

- Increase mobility options in disadvantaged communities
- Reduce greenhouse gases and pollutants
- More zero-emission vehicles
- Local solutions that inform projects throughout the state
How Can Clean Mobility Options Help?

Funding
- $20 million available in late spring 2020
  - Mobility Project Voucher
  - Community Transportation Needs Assessment Voucher

Community Building
- Education and training
- Technical assistance
- Toolkits
Funding Details - $20 million

**Mobility Project Vouchers**
- $19 million in mobility project vouchers available statewide
- At least $1 million of this set-aside for tribes
- **Maximum Project Budget:** $1 million per project

**Needs Assessment Vouchers**
- $1 million in community transportation needs assessment vouchers available statewide
- **Maximum Project Budget:** $50,000 per project
What is a Voucher?

- Type of contract that serves as “promise of payment”

- Payments are issued when project milestones are reached, on a reimbursement basis

- Vouchers expire and funds are given up if milestones are not reached within a certain timeframe
Program Timeline: Key Dates

- **June - September 2019**: Voucher Pilot Development
- **October 2019 - Spring 2020**: Application Outreach & Capacity Building
  - Regional forums and webinars.
  - 1:1 Technical Assistance
- **Late Spring 2020**: Application submission period
  - First come, first serve
  - No waitlist
- **Beyond**: Funding available for second application submission window in 2021
  - Subsequent windows dependent on available funding
Clean Mobility Options
Project Criteria
Eligibility Overview

Mobility Projects and Needs Assessments

- **Applicant**: Public entity, qualified nonprofit, or tribe
- **Location**: Serving disadvantaged communities (see next slide)

Mobility Projects

- **Experience**: At least 1 individual team member must have 1+ year operating mobility services
- **Project model**: Zero-emission car-sharing, bicycle or scooter-sharing, carpooling/ vanpooling, innovative transit, or ride-on-demand
- **Community need**: Based on community transportation needs survey that includes direct engagement with community residents
- **Financial Sustainability**: Must commit to 4 years of operations
Who Can Apply?

**Lead Applicants**
- Public agencies
- Nonprofit Organizations
- California-based Native American Tribes

**Sub-applicants**
- Any entity with lead applicant eligibility
- Public, private or nonprofit organizations
- Can include providers of mobility services, charging infrastructure, related infrastructure, community outreach, and technical services
Eligible Project Areas

**Project Area:** Where the users live, where the services will operate, and where infrastructure is to be installed

- **CalEnviroScreen 3.0**
  Disadvantaged Communities (DACs)

- **Deed restricted affordable housing** within AB 1550 Low-Income Communities or DACs

- **Tribal Lands** within AB 1550 Low-Income Communities or DACs

Types of Services

Eligible Project Models:
- Carsharing
- Carpooling/vanpooling
- Bikesharing/scooter-sharing
- Innovative transit service
- Ride-on-demand service
- Other transportation enhancements
  - Up to 10% of voucher budget
  - Transit subsidies, integration with multimodal payment cards, etc.

Transportation Enhancement Example:
VAMOS transit trip planning app, with information from multiple San Joaquin Valley transit agencies

Vamosmobility.com
Mobility Provider Directory

See Online Directory:
http://www.cleanmobilityoptions.org/directory/
Eligible Costs

End to End Resource for Planning and Implementation:

- **Planning** – e.g., partner contracting, infrastructure siting, environmental compliance and permitting

- **Capital** – vehicles and associated hardware, reservation software, EV charging equipment, infrastructure installation

- **Operations and maintenance** - e.g., leases, subsidies, insurance, repairs

- **Outreach and marketing** – community outreach & input, service promotion

- **Administration** – e.g., payment requests, meetings with Administrator, data collection for reporting and evaluation
Eligible Capital Costs

- Vehicles*
  - Zero-emission vehicles (battery electric or fuel cell) with few exceptions
  - New or used; purchased or leased
- Bicycles and scooters
- EV charging equipment
  - Must directly support the proposed mobility service
  - Level 2 or Level 3 (DC Fast Charge)

*NOTE: For medium-duty vehicles, CMO voucher reimbursement is the same voucher amount per vehicle as HVIP, with additional plus-up amounts for vehicles with batteries larger than 110 kWh

HVIP = Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project: www.californiahvip.org
Eligible Capital Costs

- Solar panels for EV charging
- Hydrogen refueling stations
- Bike / scooter infrastructure
  - Parking and docking stations
  - “Quick build” right-of-way safety improvements
  - Signage/ wayfinding
Eligible Costs for Outreach and Marketing

- Staff time to collaborate with community members and community-based organizations to ensure outreach is tailored to community culture and goals
- Pay local champions / ambassadors
- Expenses for event planning, material design, data gathering and analysis
  - Labor
  - Design and printing of marketing materials
  - Survey tools
  - Incentives for community participation
- Expenses for holding community events
  (e.g. venue space, supplies, transportation stipends)
Mobility Project Planning
Getting Ready to Apply
Project Planning Considerations

- Where should we focus new services?
- What types of mobility services are best suited for the community?
- What do community members want to see?
- What types of organizations should be on the project team?
- How do we ensure financial sustainability beyond the funding term?
Where Should We Focus New Services?

Project Area:
- Where users of the service live, services are based, and infrastructure is located
- Underserved community members with barriers to convenient, affordable mobility options

Project Size and Timeline:
- Intended to be small-scale: appropriate scale may be urban/suburban neighborhood or small rural community
- Budget that covers 3 years of voucher-funded implementation, plus additional 2 years of operation
What Types of Services Are Right for the Community?

Population Density
- Urban, suburban or rural?
- Will residents be close enough to vehicles/rides to access them without a car?
- Are there enough users in proximity to support the service?

Common Types of Trips
- Commute to work, transit first/last mile, appointments, shopping, recreation?
- How far are these trips?
- How many in the group, traveling in the same direction?
- Do users need to keep the vehicle with them?
Community Transportation Needs Assessment

**Required Mobility Project Voucher Application Component:**

- **Transportation Access Data Analysis** such as resident surveys and analysis of existing data/indicators

- **Community engagement** through at least two venues such as workshops, house meetings, focus groups, interviews, etc.

- **Report** summarizing conclusions. Applications must demonstrate a connection between the needs assessment and proposed project.

**Stand Alone Community Transportation Needs Assessment Voucher:**

- $50,000 awards to develop needs assessments
What Does the Community Want to See?

- **Identify** transportation needs and gaps by talking to residents
- **Educate** residents on service models to fill gaps
- **Empower** community members to be part of decision-making process and facilitate a sense of ownership in the project
What Types of Organizations Should Be Involved?

- Local or Tribal Government
- Community Organizations
- Mobility + Charging Providers
How to Ensure Financial Sustainability?

• Describe how the project’s financial requirements will be met beyond the second year of operations.
  • Complete a budget sheet that shows the financial requirements needed to operate the project.

• List and describe community resources that will be contributed to the project.
Project Models & Partnerships For Transit Agencies & Schools
Transit Agencies: Select Eligible Project Models

- **Eligible Project Model: Innovative Transit Service**
  - Demand-responsive flexible routes and schedules offering first/last mile transit connections serving multiple riders simultaneously
    - On-demand shuttles and circulators
    - Paratransit services
    - Microtransit

- Must be in eligible project area and be based on documented input from community members in community needs assessment
  - Needs assessment must conform to CMO criteria, which includes direct engagement with members in the project area

- Fixed route services are **NOT** eligible
Transit Partnership Models: Mobility Operations

Mobility operations through agency lead

Van Go! Rideshare Service
(San Joaquin County Regional Transit District)

SmaRT Ride On-Demand Transit
(Sacramento Regional Transit Authority)

Advantages

- Leverage additional resources
- Control of facilities and infrastructure
Agency partners with Private Operator

Curb-To-Curb Micro-Transit
Via to Transit (LA Metro, King County Metro)
RideCo (LA Metro)

Transit agencies can partner with private operators to provide curb-to-curb micro-transit and reduce barriers created by gaps in traditional transit options.

Advantages
- **Unique Value:** Narrow, deep expertise in mode. Technologically advanced.
- **Mission/Values:** For-profit companies have a fiduciary duty to make a return on investment for their investors, while non-profit companies/organizations have additional mission.
Transit Agencies and Schools: Select Eligible Vehicles

Up to Class 6 vehicles eligible:

Medium-duty vehicles:
OR
HVIP-eligible ZEV vans and shuttle buses < 26,000 lbs GVWR or <30' buses

Light-duty vehicles:
CVRP-eligible ZEV or PHEV (6+ seat capacity)

GVWR = Gross Vehicle Weight Rating (lbs)
ZEV = Zero Emission Vehicle
PHEV = Plug-In Hybrid Electric Vehicle
HVIP = Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project: www.californiahvip.org
CVRP = Clean Vehicle Rebate Project: www.cleanvehiclerebate.org
Schools: Select Eligible Project Models

Eligible Project Model: Demand-Responsive Bus
- Incorporation of dynamic scheduling or routing into conventional bus service
- Fixed route school bus service on own not eligible

Eligible Project Model: Bikesharing/Scooter-sharing
- Shared bike/scooter program to connect to school bus routes (first/last mile connection)

Eligible Project Model: Carpooling/Vanpooling
- Vanpool programs for schools and/or nonprofit schools or organizations serving students within disadvantaged community.
  - Vanpool to school, field trips
- Carpool incentives for parents
School Partnership Models: Operations

Demand-Responsive Bus Service

- Incorporation of dynamic scheduling or routing into conventional bus service
  - Day- or week- ahead scheduling based on realtime status of students, linked to portal that parents can access
  - Incorporation of traffic, weather, construction, or other road-use data into driver routing
- Model being piloted in other states (i.e. Via in New York with NYCDOE)
- Can be used to augment existing fixed route school service
- Reminder: Up to class 6 vehicles eligible

Advantages

- Build on existing service systems
- Increase operational efficiency and parent/student engagement

Source: Lion
School Partnership Models: Operations

Bikeshare operations through agency lead
LA Metro Bikeshare at Public Schools (UCLA, Santa Monica College)

- Leverage additional resources
- Control of facilities and infrastructure

Vanpool operations through private/non-profit partnership

- Flexible on-demand service
- Attune to specific community needs
Transit Agencies and Schools: Required Documents

REQUIRED FOR MOBILITY PROJECT VOUCHERS:

- **Community Transportation Needs Assessment:**
  - **SCHOOLS:** Need to demonstrate need among specific students served in project area
  - **TRANSIT AGENCIES:** Need to demonstrate specific need for services in project area

- **Letter of Commitment:**
  - **Letter of Support** from local community-based organization for project - *submit with application*
  - **Approval/Resolution** from Necessary Authority for project - *prior to voucher execution*
    - a. **SCHOOL:** School/District Board or non-profit board, as relevant, for project
    - b. **TRANSIT AGENCY:** Agency board approval/resolution
Application
Process and Components
Application Submission

First-come, first-serve approach

- Application submission period: **Late Spring 2020**
- Qualified applications:
  - Are approved in the order in which they are received
  - Are approved until funding allocation is exhausted
- No waitlist
Application Review and Awards

- **Review:** Administrator begins the review process after submission period closes
- **Grace Period:** Applicants may be asked to provide clarifications to application without losing timestamp
- **Notification of awards:** goal is to notify applicants within 1 to 2 months after submission window closes
- **After notification of awards:** Applicant must have approvals from board, council, or necessary authority before signing voucher agreement
Sample Application Contents – Mobility Projects

1. Team Profile
2. Project Narrative
3. Community Transportation Needs Assessment
4. Project Area Profile
5. Budget and Financial Sustainability Plan
6. Community Outreach and Marketing Plan
7. Infrastructure Site and Needs Profile (if relevant)
8. Letters of Commitment
Sample Supplemental Documents Required in Application

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<th>If you…</th>
<th>…then you must attach</th>
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<tr>
<td>are a non-profit or public agency</td>
<td>support letter from a community-based organization or local community group</td>
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<tr>
<td>are a non-profit organization</td>
<td>documented incorporation status for at least one year from the time of voucher application submission</td>
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<tr>
<td>are a non-profit organization</td>
<td>commitment letter from a relevant public agency indicating support and providing one or more specific examples of how it will actively engage in project implementation</td>
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<td>have sub-applicants on team</td>
<td>a team profile sheet (worksheet will be provided)</td>
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<tr>
<td>include infrastructure in your application</td>
<td>an Infrastructure Site and Needs Profile (worksheet will be provided)</td>
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Resources and Technical Assistance

- **Website:** [www.cleanmobilityoptions.org](http://www.cleanmobilityoptions.org)

- **Technical Assistance**
  - Complete TA request form on website [http://www.cleanmobilityoptions.org/assistance/](http://www.cleanmobilityoptions.org/assistance/) or
  - Email request to [info@cleanmobilityoptions.org](mailto:info@cleanmobilityoptions.org) or
  - Call *(626) 744-5670*

- **Toolkit - Available on Website**
  - Sample Needs Assessment Survey
  - Coming Soon: Project Design Guide
  - Coming Soon: Financial Sustainability Fact Sheet

- **Mobility on Demand Learning Center**
  - Case studies and other materials on [www.learn.sharedusemobilitycenter.org](http://www.learn.sharedusemobilitycenter.org)

- **Upcoming Webinars**
  - Community Transportation Needs Assessment: March 11, 2020 (10 am - 11:30 am)
  - Application Walk-Through - To Be Scheduled
Additional Funding Resources

**Sustainable Transportation Equity Project (STEP) Grant**
- New CARB grant solicitation opening mid-May 2020
- $22 million in grants available for transportation projects around the state like planning and capacity building grants to help identify community resident’s transportation needs AND
- Project grants to increase access to and use of transportation systems

**California Energy Commission’s Reliable Electric Mobility Infrastructure (REMI) Grant**
- New CEC solicitation, coming July 2021
- Infrastructure and vehicle grants for innovative mobility with emphasis on serving rural, disadvantaged and low-income communities and tribes

**Find Funding for Different Kinds of Projects**
- Funding Wizard - [www.fundingwizard.arb.ca.gov](http://www.fundingwizard.arb.ca.gov)
Questions
Thank you!