Clean Mobility Options Voucher Pilot

Community Transportation Needs Assessment Application Walk Through

Webinar
May 1, 2020
Lena Ketabgian and Barbara Jacobson, CALSTART
Brian Holland and Fabian Campos, Shared Use Mobility Center
Today’s Agenda

1. Needs Assessment Voucher Overview & Eligibility
2. Questions & Answers
3. Application Process
4. Application Materials & Checklist
5. Application Components & Application Walk Through
6. Questions & Answers
Needs Assessment Voucher
Overview & Eligibility
Clean Mobility Options Voucher Funding
2020 Funding Available - *First Come, First Served*

**Mobility Project Vouchers**
- **Total 2020 Funding:** $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
- **Application Window:** Date TBD
- **Voucher Funding Term:** 3 Years
- **Voucher Agreement Term:** 5 Years

**Needs Assessment Vouchers**
- **Total 2020 Funding:** $1 million in Needs Assessment Vouchers available statewide
- **Maximum Project Budget:** $50,000 per project
- **Application Window:** Opens June 1, 2020 until funding exhausted
- **Voucher Funding & Agreement Term:** 9-months (cost-reimbursement basis)
GOAL 1: To identify and evaluate transportation access needs, preferences, and priorities in underserved communities through meaningful, representative community engagement.

GOAL 2: To satisfy Mobility Project Voucher application requirements: Funding and technical assistance can be used to conduct a Needs Assessment, a required component for a Mobility Project Voucher application.

- Needs Assessment must be fully completed prior to submitting a Mobility Project Voucher application
- A Mobility Project Voucher can help fund zero-emission, shared-use mobility projects, such as:
  - Carsharing
  - Bike-sharing / scooter-sharing
  - Carpooling / vanpooling
  - Innovative transit service
  - Ride-on-demand service
  - Other transportation enhancements (like transit subsidies)
Outcomes of a Needs Assessment

If funded, your Needs Assessment will produce the following results:

- **Transportation Access Data Analysis** including a resident survey AND analysis of at least 3 existing data accessibility sources or indicators that explore reliability, accessibility and affordability of current transportation options.

- **Community engagement** through at least 2 venues such as in-person or virtual workshops, webinars, house meetings, focus groups, interviews, etc.

- **Report** summarizing conclusions. A future Mobility Project Voucher application must demonstrate a connection between the Needs Assessment and proposed clean mobility project.
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 organizations that provide community outreach, transportation planning, and technical services (data analysis, translation, etc.) for your Needs Assessment
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

Eligible Costs

o Expenses for project preparation/design, event planning, material design, data gathering and analysis
  • Labor
  • Subcontracts (translation services, consultants, community-based orgs)
  • Design and printing of marketing materials
  • Online event and survey tools (licenses/subscription fees)
  • Incentives for community participation

o Expenses for holding community events
  (e.g. venue space, supplies, transportation stipends)

o Education on clean vehicle technology

o Voucher administration costs (payment requests, reporting)
Questions
Application Process
Application Submission

• 2020 Application Window: **Opens June 1, 2020, 9 am (PST)**. Applications accepted for 3 months (through September 1, 2020) and on a rolling basis **until all funding is exhausted, whichever is sooner**.

• Submission Format: **Submit application + attachment(s) as 1 application package**
  - Application: Typed (Word or PDF) OR hand-written application formats accepted. No word limit. Add additional sheets, if necessary.
  - Attachment 1 (Budget Worksheet): Budgets can be submitted using either Word, Excel or PDF worksheets provided.
  - Required Supplemental Documents: Letters of Commitment/Support, Organization/Tribe Status documents, Affordable Housing Deed, etc. (depends on applicant/project type)

• Delivery Method: Email, Mail, or Deliver application package. **NO early submissions**.
  - Email: Application@cleanmobilityoptions.org
  - Mail/Delivery: CALSTART Call (626) 744-5670 in advance of in-person delivery
    ATTN: Clean Mobility Options
    48 S. Chester Ave.
    Pasadena, CA 91106
Application Review and Award Details

• **Review and Award Process:** **First-come, first-serve:**
  - Qualified applications are reviewed and approved in the order in which they are received until the funding allocation is exhausted.
  - No waitlist.
  - Grace period to request minor clarification, without losing timestamp
  - **Award notification:** Goal of approx. 1 month after submission window closes

• **Subsequent Application Windows:** In 2021 (Date TBD) and beyond, dependent on available funding
Application Materials & Checklist
Application Materials

Application available on website: [www.cleanmobilityoptions.org](http://www.cleanmobilityoptions.org)

**COMMUNITY TRANSPORTATION NEEDS ASSESSMENT VOUCHER APPLICATION DOCUMENTS**

Offers 9 months of funding of up to $50,000 to conduct a community transportation needs assessment in your Area.

**Community Transportation Needs Assessment Voucher Application** *(Word / PDF)*

*The application includes the following components:*

1. Project Team Profile
2. Project Narrative and Proposed Approach
3. Project Area
4. Proposed Budget
5. Attestations and Signature

**Attachment 1: Needs Assessment Voucher Budget Worksheet** *(Word / Excel / PDF)*

**REFERENCE:** [NEEDS ASSESSMENT APPLICATION CHECKLIST](#). Consult this application checklist to ensure your submission is complete with all required attachments.
# Application Checklist: Required Submittals for All Applicants

<table>
<thead>
<tr>
<th>REQUIRED APPLICATION DOCUMENTS (1-7)</th>
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<tbody>
<tr>
<td><strong>APPLICATION</strong></td>
</tr>
<tr>
<td>☒ 1. Project Team Profile</td>
</tr>
<tr>
<td>☒ 2. Project Narrative and Proposed Approach</td>
</tr>
<tr>
<td>☒ 3. Project Area</td>
</tr>
<tr>
<td>☒ 4. Proposed Budget</td>
</tr>
<tr>
<td>☒ 5. Attestations and Signature</td>
</tr>
<tr>
<td><strong>ATTACHMENT</strong></td>
</tr>
<tr>
<td>☒ 6. ATTACHMENT 1: Needs Assessment Voucher Budget Worksheet</td>
</tr>
<tr>
<td><strong>SUPPLEMENTAL DOCUMENT</strong></td>
</tr>
<tr>
<td>☒ 7. Letter(s) of commitment from all sub-applicants and project partners</td>
</tr>
<tr>
<td>(not required if no sub-applicants)</td>
</tr>
</tbody>
</table>

### Application Checklist: Required Supplemental Documents (Conditional)

<table>
<thead>
<tr>
<th>Lead Applicant/ Project Type</th>
<th>Supplemental Documents Required</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>All Applicants</strong></td>
<td>☒ 7. Letter(s) of commitment from all sub-applicants and project partners <em>(not required if no sub-applicants)</em></td>
</tr>
<tr>
<td>Affordable Housing</td>
<td>☐ 8. Copy of a recorded deed restriction</td>
</tr>
<tr>
<td>Non-Profit</td>
<td>☐ 9. Evidence of tax-exempt status with the IRS under Section 501 and with the California state law</td>
</tr>
<tr>
<td></td>
<td>☐ 10. Evidence of 1 year incorporation status</td>
</tr>
<tr>
<td></td>
<td>☐ 11. Evidence of active/good standing status</td>
</tr>
<tr>
<td>Non-Profit (if not CBO)</td>
<td>☐ 12. Letter of support from project-related community-based organization (CBO) or local community group</td>
</tr>
<tr>
<td>and Public Agency</td>
<td></td>
</tr>
<tr>
<td>Tribe</td>
<td>☐ 13. Documentation from tribal authority that indicates your tribal status</td>
</tr>
</tbody>
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Application Components & Application Walk Through
Application Content – Needs Assessment

1. Team Profile

2. Project Narrative and Proposed Approach
   • Explain why a needs assessment is needed.
   • Summarize existing regional or community-level transportation needs assessment efforts and identify gaps that this needs assessment voucher will fill.
   • Describe potential transportation needs & solutions that the needs assessment will address.
   • Describe the people you will engage with and their demographics.
   • Summarize planned approach for conducting a need assessment in accordance w/req’s.
   • Discuss how to ensure that your needs assessment activities reach the whole community

3. Project Area: Describe and/or map the boundaries of the Project Area.

4. Proposed Budget: ATTACHMENT 1: Needs Assessment Voucher Budget Worksheet

5. Attestations and Signature
Walk Through Needs Assessment Application

NEEDS ASSESSMENT APPLICATION - BLANK

SAMPLE NEEDS ASSESSMENT APPLICATION
Attachment 1: Needs Assessment Voucher Budget Worksheet
<table>
<thead>
<tr>
<th>Expense Category</th>
<th>Item description</th>
<th>Voucher amount requested per unit or hour($)</th>
<th>Number of units or hours requested</th>
<th>Total voucher amount by item ($)</th>
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</thead>
<tbody>
<tr>
<td>Transportation Access Data Analysis</td>
<td>Associate time, Consultant time</td>
<td>$XX/hr, $XX/hr</td>
<td>XX hrs, XX hrs</td>
<td>$x,xxx, $xxxx</td>
</tr>
<tr>
<td>Community Engagement to Determine Gaps, Needs &amp; Preferences</td>
<td>Associate time, Meeting event</td>
<td>$xx/hr, $xxxx</td>
<td>XX hrs, X events</td>
<td>$x,xxx, $x,xxx</td>
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<tr>
<td>Summary Report</td>
<td>Associate time</td>
<td>$XX/hr</td>
<td>XX hrs</td>
<td>$x,XXX</td>
</tr>
<tr>
<td>Project Preparation and Design</td>
<td>Associate time</td>
<td>$XX/hr</td>
<td>XX hrs</td>
<td>$X,XXX</td>
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<tr>
<td>Voucher Administration Costs</td>
<td>Travel, Printing, Mail</td>
<td>$xxx/mo, $xxx/mo, $xxx/mo</td>
<td>Xmos, X mos, Xmos</td>
<td>$xxxx, $xxx, $xxx</td>
</tr>
<tr>
<td>Grand Total - Voucher Agreement Term (Voucher Funds)</td>
<td></td>
<td></td>
<td></td>
<td>$XX,XXX</td>
</tr>
</tbody>
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Application Resources and Technical Assistance

Website: www.cleanmobilityoptions.org

- Assistance - Contact Us!
  - Complete TA request form on website or
  - Email: info@cleanmobilityoptions.org or
  - Call: (626) 744-5670
  - Twitter: @CACleanMobility

- Implementation Manual (Program requirements)

- Application Materials
  - Needs Assessment Application
  - Attachment 1: Needs Assessment Voucher Budget Worksheet

- Toolkit (Project Development Tools)
  - Sample Needs Assessment Application
  - Sample Needs Assessment Survey
  - Needs Assessment Data Collection Guide
  - Sample Letters of Support and Commitment
  - Needs Assessment Webinar Recording (3/11/20)
  - Community Engagement Guide (Coming soon)
Questions
Thank you!
Appendix
Start Gathering These Other Supporting Documents: Needed Post-Award

<table>
<thead>
<tr>
<th>Applicant Type</th>
<th>Supporting Documents (Required Post-Award)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Agency &amp; Non-Profit</td>
<td>□ 14. Approved resolution of governing board/authority</td>
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<tr>
<td></td>
<td>□ 15. Certificate of insurance</td>
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<tr>
<td>Tribe</td>
<td>□ 16. Approved resolution or documentation of project approval from tribal council or tribal chairperson</td>
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<tr>
<td></td>
<td>□ 17. Bureau of Indian Affairs (BIA) consent</td>
</tr>
<tr>
<td></td>
<td>□ 18. Limited Waiver of Sovereign Immunity</td>
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</tbody>
</table>