Clean Mobility Options Voucher Pilot Program

Mobility Project Voucher Application Walkthrough

September 10, 2020
Introduction to the Webinar Team

Barbara
CALSTART

John
CALSTART

Fabian
SUMC

Kevin
SUMC
Agenda

General Application Guidance
1. Award Amounts
2. Submittal Information

Question Categories
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
Poll 1: What are you most interested in learning about today?
General Application Guidance
Award Amounts

- Up to $1M in Voucher funding per eligible project

- Be as detailed as possible. The more information, the better!
  - Clearly show your thought processes as you put the application together
    - Explain how the budget funding allocations for staffing and all requested items in the budget benefit the project
  - Clearly describe your budget and project area
    - Provide census tract information as opposed to pins on a map
Eligible Applicants

- **Lead Applicants**
  - Public Agencies
  - Nonprofit Organizations
  - Native American Tribes

- **Partners (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
Application Submittal Process Guidance

- Application submittal window opens at **9:00 am PST on October 20, 2020**!
  - Submit application with all required attachments* via:
    - Email to **application@cleanmobilityoptions.org**
    - Mail, in one package, to:
      - **Attn: Clean Mobility Options.**
      - **CALSTART. 48 So. Chester Ave, Pasadena, CA 91106**

*LABEL EMAIL: If 1 email submission is not possible, please label your submission in the subject line as: "Entity Name: Email 1 of 2", for example. Your first submission will serve as your timestamp.

*LABEL FILES/ATTACHMENTS: Please label your attachments and files, indicating the application requirement they complete along with the name of the document. For example: "Entity Name_Community Resource Contribution #1: XX Description" or "Entity Name_Needs Assessment Survey" or "Entity Name_Letter of Commitment From Public Agency: XX Transit Authority."

*LIST ATTACHMENTS: Add a Table of Contents that lists all attachments provided and how they complete the application requirements.
Application Submittal Process Guidance

- **Timestamps** are based on the *date and time* the application is received by the Program Administrator’s email system and the postmark date and time.

- **No early submissions.** *Early submissions will be rejected.* Applications will not be accepted prior to 9:00 am PST on 10/20/2020. Early applications will not be returned.

- **No incomplete submissions.** Submitted applications must be complete, and include all required documents, to be evaluated.
Poll 2: How familiar are you with the Mobility Project Voucher Application?
Mobility Project Voucher Application
Question Categories
Team Profile
Team Profile: Questions 1-6

- **Question 1:** Lead applicant general contact info.
- **Question 2:** Organization type.
- **Question 3:** Please describe your organization’s background and qualifications, such as history of local engagement, key areas of expertise, and your experience working with disadvantaged and low-income communities or tribes. Please identify how this background enables you to efficiently and effectively implement this project.
- **Question 4:** Does your app contain sub-applicants?
  - *Conditional Attachment #3: If your application includes sub-applicants, please attach a Team Profile Worksheet (Attachment 3)*
Team Profile Goals: Continued

- **Question 5:** What is the name of a partner on your team with at least one year of experience operating mobility services, and what role they play?
  - Each team must include an organization with at least one year of experience operating mobility services.
  - Conditional Question 4a: If you have an “experienced partner” or a mobility service provider on your team, please outline their experience operating mobility services for at least one year, including location and type of service.

- **Question 6:** Do all partners included in your app team have full support from decision-makers in their organization?
  - Question 6a Conditional: If any application team members still require approvals to participate in the project, please state which member(s), who has the authority to approve, the process for approval, and anticipated approval timelines.
# Team Profile Goals: Required Attachments

<table>
<thead>
<tr>
<th>Required Attachments for Team Profile Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Question 4*</td>
</tr>
<tr>
<td>Conditional Attachment #3: If your application includes sub-applicants, please attach a Team Profile Worksheet (Attachment 3)</td>
</tr>
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*conditional attachment
# Project Team Profile

This section collects information about the project team.

1. Lead applicant ("you" or "your") general contact information: [write in]

<table>
<thead>
<tr>
<th>Organization Name / Agency Name / Tribe Name:</th>
<th>Authorized Representative:</th>
</tr>
</thead>
<tbody>
<tr>
<td>CleanTech Incubator</td>
<td>Greg David</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Project Lead Contact Name and Title:</th>
<th>California-Based Affiliate Contact (if different from the Lead Contact Name):</th>
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</thead>
<tbody>
<tr>
<td>Juan Doe, Research Manager</td>
<td>Not Applicable</td>
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<table>
<thead>
<tr>
<th>Person with Contract Signing Authority (if different from above):</th>
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<tr>
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</table>

<table>
<thead>
<tr>
<th>Street Address or P.O. Box:</th>
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</thead>
<tbody>
<tr>
<td>321 First Street, Suite 101</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Organization City / Town:</th>
<th>Zip Code:</th>
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<tbody>
<tr>
<td>Zenith Beach</td>
<td>90080</td>
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<table>
<thead>
<tr>
<th>Project Lead Phone:</th>
<th>Project Lead Email Address:</th>
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<tr>
<td>555-555-2345</td>
<td><a href="mailto:juan@email.org">juan@email.org</a></td>
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<th>Mailing Address (if different):</th>
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<td>Not Applicable</td>
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I have read and understood the terms and conditions of the Sample Voucher Agreement (can be found in the Implementation Manual for The Clean Mobility Voucher Pilot Program, Appendix C: Mobility Project Sample Voucher Agreement).

I hereby certify under penalty of perjury that all information provided in this application and any attachments are true and correct.

<table>
<thead>
<tr>
<th>Printed Name of Responsible Party:</th>
<th>Title:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Juan Doe</td>
<td>Research Manager</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Signature of Responsible Party:</th>
<th>Date:</th>
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<tbody>
<tr>
<td></td>
<td>October 10, 2020</td>
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Project Narrative
Project Narrative: Questions 7-11

- **Question 7**: Please describe the project proposal.
  - The response must address all of the following:
    - *Project name*
    - *Define project goals and main objectives.*
    - *What types of mobility services or technologies will be employed?*
    - *If you seek funding for expanding an existing mobility service, describe how your proposal will result in increasing ridership or use of an existing mobility service.*
    - *Who are the intended users/riders?*
    - *Is there any additional transportation enhancement beside the core project model? Explain.*
    - *Where will service(s) be provided?*
    - *What types of trips or destinations will be served?*
    - *What equipment or infrastructure will be deployed?*
    - *How will each team member contribute to various elements of the project?*
Project Narrative: Continued

- **Question 8:** What are the core project model(s) included in your project? (if applicable, enter percentage amount of voucher funds allocated to each model).
- **Question 9:** Which of the following categories of infrastructure does your proposal include?
  - Question 9a: For each category listed above (except “none”), please complete and attach the Infrastructure Site and Needs Profile Worksheet (Attachment 2) for all that apply and write in “attached” in the box along with any comments.
Project Narrative: Continued

- **Question 10:** Does your project include any additional transportation enhancements that are not listed in Section E.3 of the Program Implementation Manual?
  - Conditional Question 10a: If yes, please explain the proposed transportation enhancement.

- **Question 11:** Please describe the key activities you will conduct for project development and operations, project milestones and the timeline needed to successfully launch the project and operate the service for at least 4 years.
<table>
<thead>
<tr>
<th>Required Attachments for Project Narrative</th>
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<tbody>
<tr>
<td>Question 9a*</td>
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<tr>
<td>Conditional Attachment (Attachment 2)</td>
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<tr>
<td>Infrastructure Site and Needs Profile</td>
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<tr>
<td>Worksheet</td>
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</table>

*conditional attachment
Community Transportation Needs Assessment
Community Transportation Needs Assessments: Questions 12-18

- **Question 12:** What data sources and indicators have you used to develop a Transportation Access Data Analysis: Please attach a copy of the resident survey used in analysis

- The response should list data sources and/or accessibility indicators (a resident survey is required, in addition to a minimum of three data sources or indicators. Data sources and accessibility indicators include but are not limited to:
  a. Surveys of residents regarding existing travel behavior. Surveys may be administered through in-person interviews, paper or online questionnaires, and options must be provided for residents that do not have access to a computer or the internet.
  b. Accessibility indicators:
     i. EPA Walkability Index
     ii. Vehicle ownership per household (from Census American Community Survey)
     iii. Cost of existing transit and average cost per week for fueling car
     iv. Median household income
     v. Access to job opportunities (from LEHD-LODE)
     vi. List any existing shared clean mobility projects in the community (ex. bikeshare, electric shuttle or buses, electric carshare, etc.); existing public transit stops; and/or existing bicycle routes.
Community Transportation Needs Assessments: Continued

- **Question 13**: Based on your Transportation Data Analysis, what are the community’s main travel patterns and transportation gaps?
  - The response must provide a summary analysis with key conclusions about travel patterns and transportation gaps (e.g. a Transportation Access Data Analysis) in the community based on the sources above. The purpose of this response is to provide an objective demonstration of needs that can be validated.

- **Question 14**: What types of meaningful, representative, community engagement activities have been conducted to assess the community’s transportation needs?
  - Note: The response must discuss community engagement activities done through at least two engagements such as workshops, community meetings, house meetings, focus groups, interviews, or other direct interface with residents.
Community Transportation Needs Assessments: Continued

- **Question 15:** What were the main transportation and mobility needs identified by the community engagement activities outlined? Describe in detail.
  - The response should provide a comprehensive description of the range of preferred transportation solutions identified through community engagement, including those not addressed the proposed project. Please address in particular:
    a. **What preferences for transportation solutions have been expressed?**
    b. **What were the most commonly expressed preferences for transportation solutions?**
    c. **Which of these solutions does your project provide?**
    d. **If your project does not provide the most popular transportation solution, why not?**
Community Transportation Needs Assessments: Continued

- **Question 16:** How does your proposed project contribute to addressing the needs and preferences for transportation solutions expressed by the community in the needs assessment?
  - What preferences for transportation solutions have been expressed?
  - What were the most commonly expressed preferences for transportation solutions?
  - Which of these solutions does your project provide?
  - If your project does not provide the most popular transportation solution, why

- **Question 17:** When were the needs assessment activities described above completed? Needs assessments must have been completed within the past four years.
Community Transportation Needs Assessments: Continued

- **Question 18**: Attach the Summary Report of your community transportation needs assessment.
  - *The report must provide a summary of the outcomes of the assessment. The application must demonstrate a direct connection between the needs assessment conclusions included in the report and a proposed project model (e.g. target community/audience, scale of project, project model).*
## Community Transportation Needs Assessments: Required Attachments

<table>
<thead>
<tr>
<th>Question</th>
<th>Attachment Required</th>
</tr>
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<tbody>
<tr>
<td>Question 12</td>
<td>Attach a copy of the resident survey used in the Transportation Access Data Analysis</td>
</tr>
<tr>
<td>Question 18</td>
<td>Attach Summary Report</td>
</tr>
</tbody>
</table>
Fulfilling the Needs Assessment Requirement for MPV means:

- Provide summary of sources used to for a Transportation Access Data Analysis

- This includes **resident surveys** about travel behavior (required) and the analysis of **three** additional existing data/indicators that explore current transportation options:
  - Reliability
  - Accessibility
  - Affordability

Website Toolkit: [Clean Mobility Options Needs Assessment Data Collection Guide](#)
Project Area Profile
Poll 3: What do you see as the biggest challenges for the project area?
Question 19: Which of the following geographies is your Project Area located within?

- CalEnviroScreen 3.0 Disadvantaged Communities (top 25%)
- Deed restricted affordable housing within AB 1550 Low-Income Communities or DACs
- Tribal Lands within AB 1550 Low-Income Communities or DACs

Legend
- SB 535 Disadvantaged Communities (DACs)
- Affordable Housing Properties w/in AB 1550 Low Income Communities
- Tribal Lands w/in AB 1550 or SB 535 areas
Project Area Profile: Continued

- **Question 19a**: If your project area is within an affordable housing facility, please provide the address of the facility or facilities.

- **Conditional 19b**: Attachment required if your project area falls within an affordable housing facility/facilities. In addition, please provide a copy of a recorded deed restriction, regulatory agreement or covenant that restricts the property to low-income residential housing as defined in the California Public Utilities Code Section 2852(a)(3)(A)(i) and has at least 10 years remaining on the term of the property’s affordability restrictions.
Project Area Profile: Continued

- **Question 19c**: If your project area eligibility is based on location on tribal lands, please provide the name of the reservation, or if not part of a reservation, the address of the tribally-owned facility.

- **Question 19d**: If your project area eligibility is based on location in the CalEnviroScreen 3.0 Disadvantaged Community (DAC), please identify the census tract and ranking score in CalEnviroScreen 3.0.

- **Note**: Census tracts are needed for all project areas, not just for those in a DAC.
Project Area Profile: Continued

- **Question 20:** Describe the boundaries of the Project Area in *only one* of the following ways:
  - (a) If Project Area boundaries are the same as census tract boundaries, list the census tracts,
  - (b) provide a map showing the geographic boundaries and *attach* it to your application (or provide it within the body of the application),
  - (c) describe the boundaries using street names and cross streets.

- **Question 21:** What is the population size of the project area? Please include your source.
Project Area Profile: Continued

- **Question 22:** Are you submitting application(s) for project area(s) that are located entirely inside unincorporated areas (i.e. no city government represents the area)?
  
  Note: This question and its following conditional questions are not applicable for project areas on tribal lands.

  - Q22a: If you are submitting more than one application (up to three applications are allowed if the entire project area(s) are located in unincorporated communities), are the project areas located entirely within unincorporated county jurisdiction?
  
  - Q22b: Please indicate the location(s).
## Project Area Profile: Required Attachments

<table>
<thead>
<tr>
<th>Question 19b*</th>
<th>Attachment required if your project area falls within an affordable housing facility/facilities</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Provide a copy of a recorded deed restriction, regulatory agreement or covenant that restricts the property to low-income residential housing as defined in the California Public Utilities Code Section 2852(a)(3)(A)(i) and has at least 10 years remaining on the term of the property’s affordability restrictions</td>
</tr>
<tr>
<td></td>
<td><strong>Example:</strong> <em>EntityName_Deed_PropertyName_PropertyAddress</em></td>
</tr>
</tbody>
</table>

*conditional attachment
Budget and Financial Sustainability Plan
Budget and Financial Sustainability Plan: Questions 23-29

- **Question 23**: Please indicate the total voucher amount you are requesting in this application.

- **Question 24**: Please indicate the project type: New up to $1M, existing up to $600K, or a combination of new and existing up to $1M.

- **Question 25**: Attach a “Mobility Project Voucher Budget Worksheet” (Attachment 1) that quantifies the financial requirements needed to develop and implement the project throughout the 5-year voucher agreement term.
Budget and Financial Sustainability Plan: Continued

- **Question 26**: Describe your strategies for maintaining the proposed service(s) for a minimum of a 4-year project operation period.

- **Question 27**: Describe your strategies for ensuring vehicles and equipment continue to serve the community if operation discontinues after the 4 year voucher agreement term.
Question 28: Describe at least five types of Community Resource Contributions that are being provided to meet the requirements described in Section J.7 of the CMO Implementation Manual.

Question 29: Attach at least one supporting document for each of the five Community Resource Contributions proposed in your previous response.
General Budget Guidance

- Be Mindful of Maximum Allowable Voucher Funding Per Project
  - Cost Category
    - Planning, Capital, Operations, and Maintenance: 90% of total Voucher
    - Voucher Admin Costs: Up to 15% Voucher
    - Outreach and Marketing: Minimum of $25K or 10% of Voucher; 30% max.
    - Additional Transportation Enhancements: 10% of Voucher
  - Infrastructure and Vehicle Maximums
    - New light-duty zero emission vehicle ≥ 299 miles of range: Up to $60K
    - New electric bicycle: Up to $3,500
    - Etc.
General Budget Guidance: Continued

● **Consider ALL possible costs**
  ○ Permitting, parking, equipment maintenance/replacement
  ○ Capital costs for fleet ownership vs partnering with Mobility Providers
  ○ Insurance costs
  ○ Costs associated with launch
    ■ Software / sharing systems platforms
    ■ Low income subsidies for membership (if shared service) or providing for free
    ■ Staffing for planning and operations (if not partnering with mobility provider)
  ○ Contingency costs

● **In short, be as detailed as possible**
# Budget Template and Walkthrough

## Mobility Project Voucher Budget Worksheet

Template available at the CMO Website as Excel, Pdf, or Word

<table>
<thead>
<tr>
<th>Section 1: Project Components</th>
<th>Description of Voucher Request</th>
<th>Section 2: Voucher Budget</th>
<th>Section 3: Other Funds Budget</th>
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</thead>
<tbody>
<tr>
<td>(a) Expense category</td>
<td>(b) Item Description</td>
<td>(c) Voucher Amount request per unit ($$)</td>
<td>(d) Number of Units or Hours Requested</td>
</tr>
<tr>
<td>Motor Vehicles and Associated Hardware</td>
<td>Ford E-450 Shuttle Lease</td>
<td>$825/month</td>
<td>48 units</td>
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<tr>
<td>Bicycle and Scooters</td>
<td>2020 Roadster e-bike (various models)</td>
<td>$1,500/bike</td>
<td>40 units</td>
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Clean Mobility Options
<table>
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<tr>
<th>(a) Expense category</th>
<th>(b) Item Description</th>
<th>(c) Voucher Amount request per unit ($$)</th>
<th>(d) Number of Units or Hours Requested</th>
<th>(e) Total Voucher Amount by Item ($$$)</th>
<th>(f) Project Launch (Up to 1 Year) ($$$)</th>
<th>(g) Year 1 Operations ($$$)</th>
<th>(h) Year 2 Operations ($$$)</th>
<th>(i) Year 3 of Operations ($$$)</th>
<th>(j) Year 4 of Operations ($$$)</th>
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<tbody>
<tr>
<td>Charging/ Fueling Equipment and Installation</td>
<td>Solar array/inverter with installation</td>
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<td>7,920 Watts</td>
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<td>500 hours</td>
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<tr>
<td></td>
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<td>500 hours</td>
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## Budget Walkthrough: Continued

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<th>(a) Expense Category</th>
<th>(b) Item Description</th>
<th>(c) Voucher Amount per unit ($$)</th>
<th>(d) Number of Units or Hours Requested</th>
<th>(e) Total Voucher Amount by Item ($$)</th>
<th>(f) Project Launch (Up to 1 Year) ($$$)</th>
<th>(g) Year 1 Operations ($$$)</th>
<th>(h) Year 2 Operations ($$$)</th>
<th>(i) Year 3 of Operations ($$$)</th>
<th>(j) Year 4 of Operations ($$$)</th>
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<tbody>
<tr>
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<td>Community Advisory Panel Compensation</td>
<td>$30/mtg per volunteer (10 total)</td>
<td>60 total</td>
<td>$10,800</td>
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<td>Outreach and Marketing Costs</td>
<td>Gift Cards to Incentivize Use and Participation</td>
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**Grand Total**

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**Clean Mobility Options**
## Budget and Financial Sustainability Plan: Required Attachments

<table>
<thead>
<tr>
<th>Question</th>
<th>Required Attachment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Question 25</td>
<td>Attach a “Mobility Project Voucher Budget Worksheet (Attachment 1).”</td>
</tr>
<tr>
<td>Question 29</td>
<td>Attach at least one supporting document for each of the five Community Resource Contributions.</td>
</tr>
</tbody>
</table>
Community Outreach and Marketing Plan
Community Outreach and Marketing Plan: Questions 30-31

- **Question 30:** Describe, in detail, your plan to engage the community residents through outreach and education to prepare for the launch of the project and throughout the project’s operations. Identify key project stages in which outreach will occur, key partners, their roles for outreach and education, and their knowledge and experience within the community that will enable them to do successful outreach.

- **Question 31:** Describe how you will engage with other community stakeholders affected by the project.
  - The responses should consider and discuss target audience, with consideration of promoting users of service / riders, groups in communities to reach, workplaces, destinations, and Multi-Unit Dwellings. See Section J.8 of the CMO Implementation Manual for details.
Infrastructure Site and Needs Profile
(If applicable)
Infrastructure Site and Needs Profile:

Attachment 2: Section I. Overview

1. Please indicate your organization’s name as it appears on the application and a short project description (e.g. “Community Mobility Solutions – Bikeshare in Stockton”).

2. Please indicate which of the following categories of infrastructure your application requests funding for (check all those that apply):

3. Please describe your overall plan for deploying the infrastructure equipment and, why it is necessary to support the mobility services in your project proposal.
Attachment 2: Section II. Infrastructure Site and Needs Profile by Category

A. Electric Vehicle Supply Equipment (EVSE) – Level 2 or DC Fast Charger *(14 questions)*

B. Bicycle and Scooter Infrastructure *(14 questions)*

C. Solar Photovoltaic Equipment *(14 questions)*

D. Hydrogen Fueling Infrastructure *(16 questions)*

- Type of Infrastructure Being Installed
- Target Locations for Infrastructure
- Description of infrastructure
- Authorization to Use Existing Right of Way/Infrastructure
- Necessary Permits
- Contingency Plan for Moving Forward Without Permits
- Name of Permit(s), Permitting Agency, Summary of Permits, Status of Permit, Project Timeline
- Description of 80/20 Infrastructure Requirement
- Filing of Notice of Exemption (NOE) from CEQA
- If Not, Lead Agency Working to Obtain NOE
- Do you Own the Property for the Infrastructure Installation
- If Not, Letters of Support/Commitment from Current Property Owner (Attach)
- Has Part of Infrastructure Installed
- Describe Existing Infrastructure Installed
Supplemental Attachments Letters of Commitment
# Summary of Application Submittal Documents

**Link to Checklist on Website**

<table>
<thead>
<tr>
<th>Categorization</th>
<th>#</th>
<th>Required Documents</th>
<th>Lead Applicant</th>
<th>Sub-Applicant(S)</th>
</tr>
</thead>
</table>
| **Application & Supporting Documentation** | 1 | Mobility Project Voucher Application  
A. Project Team Profile  
B. Project Narrative  
C. Community Transportation Needs Assessment  
D. Project Area Profile  
E. Project Budget and Plan for Sustainability  
F. Community Resource Contributions  
G. Community Outreach Plan  
H. Attestations and Signatures | X X X | X X X |
| | 2 | Community Transportation Needs Assessment  
(1) Copy of Resident Survey; and (2) Copy of Summary Report | X X X | X X X |
| | 3 | Operating Contingency Plan  
(Infrastucture Site Contingency Plan) | When applicable | When applicable |
| **Application Worksheets** | 4 | Attachment 1: Mobility Project Voucher Budget Worksheet | X X X | X X X |
| | 5 | Attachment 2: Infrastructure Site & Needs Profile Worksheet  
(Infrastructure Funding requests for Level 2 / DC fast charger EVSE; Bike / Scooter / H2 fueling infrastructure; solar PV equipment) | When applicable | When applicable |
| | 6 | Attachment 3: Team Profile Worksheet  
(Compiled & Submitted by Lead Applicant) | X X X | X X X |
| **Letters of Support & Commitment** | 7 | Letters of Commitment from All Sub-Applicants & Project Team Members | X X X X | X X X X |
| | 8 | Letters of Commitment from Public Agency (If Lead Applicant is a non-profit) | X | X |
| | 9 | Letters of Support from Community-Based Organization (If Lead Applicant not CBO) | X | X |
| | 10 | Letters of Support / Commitment for Site Control / Right-of-Way Permission  
(If Applicant is not site owner / right-of-way holder) | When applicable | When applicable |
| **Secretary of State Docs** | 11 | Secretary of State Certificate of Status  
(Evidence of Active / Good Standing Status w/Secretary of State) | X X X | X X X |
| | 12 | Secretary of State Statement of Information  
(Evidence of Secretary of State Registration and current status) | X X X | X X X |
| | 13 | Articles of Incorporation  
(Evidence of at least 1 year Incorporation) | X X X | X X X |
| **Fiscal Sponsorship Contract** | 14 | Fiscal Sponsorship Contract  
(For unincorporated non-profit sub-applicants not registered with Secretary of State) | When applicable | When applicable |
| **IRS & Tax Exemption** | 15 | IRS Determination Letter  
(Evidence of IRS 501 Status Exemption) | X X X | X X X |
| | 16 | CA Franchise Tax Board Exemption Letter  
(Evidence of State Tax Exemption) | X | X |
| **Tribal Status** | 17 | Tribal Authority Status  
(Document Indicating tribal status from tribal authority) | When applicable | When applicable |
| **Affordable Housing** | 18 | Recorded Deed / Regulatory Agreement  
(Project area w/ eligible affordable housing) | X X X | X X X |
| **Site Control** | 19 | Site Control Agreements  
(For DC Fast Chargers & H2 Fueling Infrastructure sites) | When applicable | When applicable |
## Supplemental Documents Required

<table>
<thead>
<tr>
<th>Condition</th>
<th>Required Document</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are a nonprofit or public agency</td>
<td>Support letter from a community-based organization or local community group</td>
</tr>
<tr>
<td>Are a nonprofit organization</td>
<td>Documented incorporation status for at least one year from the time of voucher application submission</td>
</tr>
<tr>
<td>Are a nonprofit 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>
</tr>
<tr>
<td>Have sub-applicants on team</td>
<td>Team profile sheet (worksheet will be provided)</td>
</tr>
<tr>
<td>Include infrastructure in your application</td>
<td>Infrastructure Site and Needs Profile (worksheet will be provided)</td>
</tr>
</tbody>
</table>

Clean Mobility Options

![Clean Mobility Options logo]
Letters of Commitment

- Letters of Commitment from all sub-applicants and project team members
- Letters of Commitment from public agency (If Lead Applicant is a non-profit)
- Letters of Support from community-based organization (If Lead Applicant not CBO)
- Letters of Support/Commitment for site control/right-of-way permission (if applicant is not site owner/right-of-way holder)
- Attachment 3, Question 4: Please provide a list of all organizations who have provided letters of support or letters of commitment to support the project.
Next Steps & Technical Assistance
Application Submission

First-come, first-serve approach

- Mobility Project Voucher Application submission period opens **October 20th, 2020 at 9AM (PT)**
  - Applications approved in the order in which they are received
  - Applications approved until funding allocation is exhausted
  - No waitlist

- Fall 2020: **$20 million total** available to eligible communities statewide ($2 million of the total set-aside for tribal communities)

- Maximum Project Budget: $1 million per project (new service), up to $600K for expanding existing service into new DAC areas
CMO is a voucher-based, first-come, first-served model

- Voucher is a contract that serves as “promise of payment”
- Payments are issued when set project milestones are reached, on a reimbursement basis
- Vouchers expire and funds are given up if milestones are not reached within a certain timeframe
- First-come, first-served means applications are reviewed, evaluated, and awarded in the order they are received, until funds are exhausted
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 place in the queue.

- **Notification of Awards:** Aim to notify applicants within six weeks after submission window closes.*

- **Post-Award:** Awardee must provide project approvals from board, council, or necessary authority, and other required documents, insurance, and agreements prior to voucher execution.**

*Award notification timeline may take longer depending on volume of applications received.

**See Application and Post-Award Document Checklist for complete requirements.
Mobility Provider Directory

Bird
Commute
Lyft
VeoRide
Bluesystems
Envoy
MioCar
Via
Circuit
Greencommuter
Mobility Development
Coaster Cycles
HopR
Spin
Zipcar
Clean Mobility Options
Poll 4: After this walkthrough, what area of the application would you like more information on?
Questions?
Resources & Technical Assistance

Contact Us!
- 626-744-5670
- info@cleanmobilityoptions.org
- www.cleanmobilityoptions.org

Office Hours Sessions:
- 9/23 at 1:00PM for all applicants (biweekly!)

Upcoming Webinars:
- Mobility Provider Roundtable on 9/16
Thank you!