

## APPLICATION & POST-AWARD DOCUMENT CHECKLIST - MOBILITY PROJECT VOUCHER

This Application & Post-Award Document Checklist lists the required documents for the Mobility Project Voucher for the Clean Mobility Options Voucher Pilot Program, as listed by Lead and Sub-Applicant entity. This checklist is intended to be used as a resource to help applicants identify the required documents at time of application submittal and to help prepare for post-award submission requirements. [Page 2 offers tips on accessing, gathering, and submitting these documents.](#)

**TECHNICAL ASSISTANCE:** For complete program requirements, please view the Implementation Manual at <https://www.cleanmobilityoptions.org/implementation-manual/> or contact our Technical Assistance team at [info@cleanmobilityoptions.org](mailto:info@cleanmobilityoptions.org) or (626) 744-5670 with any questions.



		KEY: X = REQUIRED DOCUMENT   BLANK = NOT REQUIRED			LEAD APPLICANT			SUB-APPLICANT(S)			
CATEGORY	#	REQUIRED DOCUMENTS	PUBLIC AGENCY	NON-PROFIT	TRIBE	PUBLIC AGENCY	NON-PROFIT	PRIVATE ORG	TRIBE		
<b>APPLICATION SUBMITTAL DOCUMENTS (REQUIRED AT TIME OF APPLICATION SUBMISSION)</b>											
APPLICATION & SUPPORTING DOCUMENTATION	1	<b>MOBILITY PROJECT VOUCHER APPLICATION</b> 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						
	2	<b>COMMUNITY TRANSPORTATION NEEDS ASSESSMENT: 2 Attachments: (1) Copy of Resident Survey; and (2) Copy of Summary Report</b>	X	X	X						
	3	<b>COMMUNITY RESOURCE CONTRIBUTIONS - 5 Supporting Docs (Min. 1 Per Contribution)</b>	X	X	X						
	4	<b>OPERATING CONTINGENCY PLAN</b> (Infrastructure Site Contingency Plan)	When applicable			When applicable					
APPLICATION WORKSHEETS	5	<b>ATTACHMENT 1: Mobility Project Voucher Budget Worksheet</b>	X	X	X						
	6	<b>ATTACHMENT 2: Infrastructure Site &amp; Needs Profile Worksheet</b> (Infrastructure Funding requests for Level 2 / DC fast charger EVSE; Bike / Scooter / H2 fueling infrastructure; solar PV equipment)	When applicable			When applicable					
	7	<b>ATTACHMENT 3: Team Profile Worksheet</b> (Compiled & Submitted by Lead Applicant)	X	X	X						
LETTERS OF SUPPORT & COMMITMENT	8	<b>LETTERS OF COMMITMENT FROM ALL SUB-APPLICANTS &amp; PROJECT TEAM MEMBERS</b>				X	X	X	X		
	9	<b>LETTERS OF COMMITMENT FROM PUBLIC AGENCY</b> (If Lead Applicant is a non-profit)		X							
	10	<b>LETTERS OF SUPPORT FROM COMMUNITY-BASED ORGANIZATION</b> (If Lead Applicant not CBO)	X	X							
	11	<b>LETTERS OF SUPPORT / COMMITMENT FOR SITE CONTROL / RIGHT-OF-WAY PERMISSION</b> (If Applicant is not site owner / right-of-way holder)	When applicable			When applicable					
SECRETARY OF STATE DOCS	12	<b>SECRETARY OF STATE CERTIFICATE OF STATUS</b> (Evidence of Active / Good Standing Status w/Secretary of State)		X			X	X			
	13	<b>SECRETARY OF STATE STATEMENT OF INFORMATION</b> (Evidence of Secretary of State Registration and current status)		X			X	X			
	14	<b>ARTICLES OF INCORPORATION</b> (Evidence of at least 1 year Incorporation)		X			X	X			
FISCAL SPONSORSHIP CONTRACT	15	<b>FISCAL SPONSORSHIP CONTRACT</b> (For unincorporated non-profit sub-applicants not registered with Secretary of State)					When applicable				
IRS & TAX EXEMPTION	16	<b>IRS DETERMINATION LETTER</b> (Evidence of IRS 501 Status Exemption)		X			X				
	17	<b>CA FRANCHISE TAX BOARD EXEMPTION LETTER</b> (Evidence of State Tax Exemption)		X			X				
TRIBAL STATUS	18	<b>TRIBAL AUTHORITY STATUS</b> (Document indicating tribal status from tribal authority)			X						
AFFORDABLE HOUSING	19	<b>RECORDED DEED / REGULATORY AGREEMENT</b> (Project area w/in eligible affordable housing)	X	X	X						
SITE CONTROL	20	<b>SITE CONTROL AGREEMENTS</b> (For DC Fast Chargers & H2 Fueling Infrastructure sites)	When applicable			When applicable					
<b>POST-AWARD DOCUMENTS (REQUIRED PRIOR TO VOUCHER EXECUTION)</b>											
CONTRACTS, DOCUMENTS, AND APPROVALS	1	<b>MOBILITY PROVIDER CONTRACT</b> (Within 3 months of Voucher Execution)	When applicable			When applicable					
	2	<b>BOARD RESOLUTION</b>	X	X	X						
	3	<b>PAYMENT MILESTONE SCHEDULE</b> (form provided by Program Administrator)	X	X	X						
	4	<b>OTHER REQUESTED DOCS</b> (Based on applicant type, project approach / model)	X	X	X						
	5	<b>SITE CONTROL AGREEMENTS / COPIES OF ISSUED RIGHT-OF-WAY PERMISSIONS</b> (1) For all Infrastructure Funding Requests when Site Agreements not previously submitted; and/or (2) When Applicant is not site owner / right-of-way holder)	When applicable			When applicable					
	6	<b>CERTIFICATES OF INSURANCE</b> (in compliance with Sections Z.1.n.i and Z.1.n.ii of IM)	X	X	X	X	X	X	X	X	
TRIBAL DOCUMENTS	7	<b>BUREAU OF INDIAN AFFAIRS (BIA) CONSENT</b> (Federally Recognized / Controlled Tribes only)									
	8	<b>LIMITED WAIVER OF SOVEREIGN IMMUNITY</b> (Federally Recognized / Controlled Tribes only)			X						

**PAGE 2 - TIPS ON ACCESSING AND SUBMITTING SUPPORTING DOCUMENTATION & APPLICATION MATERIALS - MOBILITY PROJECT VOUCHER**

Below are tips for gathering, accessing, and submitting supporting documents and application materials for the Mobility Project Voucher. *Please refer to the checklist on Page 1 to identify if the below items are applicable to your submission based on the type of Lead and Sub-Applicant for your project.* For complete application eligibility and submission requirements, please refer to the Implementation Manual available on the website at <https://www.cleanmobilityoptions.org/implementation-manual/> or **contact our Technical Assistance team at [info@cleanmobilityoptions.org](mailto:info@cleanmobilityoptions.org) or (626) 744-5670 with any questions.**

<b>APPLICATION SUBMITTAL DOCUMENTS (REQUIRED AT TIME OF APPLICATION SUBMISSION)</b>			
<b>CATEGORY</b>	<b>#</b>	<b>REQUIRED DOCUMENT</b>	<b>TIPS &amp; LINKS TO SUPPORTING DOCUMENTS &amp; APPLICATION MATERIALS</b>
<b>APPLICATION &amp; SUPPORTING DOCUMENTATION</b>	1	<b>MOBILITY PROJECT VOUCHER APPLICATION</b>	Submit a <b>complete application form</b> with all questions answered, all boxes checked, all signatures provided. There is no maximum word limit. Attach additional pages as necessary. <b>Application Submission:</b> Submit your complete application as 1 package <b>no earlier than on the application window opening date and time</b> via email to <a href="mailto:application@cleanmobilityoptions.org">application@cleanmobilityoptions.org</a> or via mail to: Attn: Clean Mobility Options. CALSTART. 48 S. Chester Avenue, Pasadena, CA 91106. No in-person deliveries and no early submissions will be accepted. If 1 package submission is not possible, please label your submission as "Entity Name: Email 1 of 2", for example. Your first submission will serve as your timestamp. Application materials are available on the website at: <a href="https://www.cleanmobilityoptions.org/application-materials/">https://www.cleanmobilityoptions.org/application-materials/</a> <b>List of Attachments:</b> To facilitate application review, you are encouraged to add a Table of Contents that <b>Lists all of the Attachments provided with your application and describes how they complete the application requirement.</b> <b>Label Attachments:</b> Please <b>label your attachments and files</b> , accordingly, indicating the application requirement they complete along with the name of the document. <i>For example:</i> "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."
	2	<b>COMMUNITY TRANSPORTATION NEEDS ASSESSMENT</b> <b>2 Attachments:</b> <b>(1) Copy of Resident Survey; and</b> <b>(2) Copy of Summary Report</b>	Submit the following <b>2 Needs Assessment documents</b> with your application submission to demonstrate proof of Needs Assessment completion: 1. <b>Copy of Resident Survey</b> used for Needs Assessment; and 2. <b>Copy of Summary Report</b> that summarizes the outcomes of the Needs Assessment and demonstrates a direct connection to the proposed project model (e.g. target community/audience, scale of project, project model). See IM Section J3.
	3	<b>COMMUNITY RESOURCE CONTRIBUTIONS</b> <b>(5 Supporting Docs - min. 1 per Contribution)</b>	<b>5 minimum supporting documents required (Minimum 1 per Contribution):</b> Attach at least one supporting documentation for each of the 5 required Community Resource Contributions with your application submission. See IM Section J7.
	4	<b>OPERATING CONTINGENCY PLAN (When applicable)</b>	<b>When applicable</b> , an Operating Contingency Plan is required to be submitted with your application <b>if the proposed infrastructure site has any of the following statuses:</b> (a) use of public right-of-way has not yet been granted, or (b) a new service drop, undergrounding, or new utility interconnection is necessary, or (c) the infrastructure site is located in a county or city that is not the Electric Vehicle Charge Station (EVCS) Permit Ready or where permit streamlining is in progress. See IM Section J9d for details.
<b>APPLICATION WORKSHEETS</b>	5	<b>ATTACHMENT 1: Mobility Project Voucher Budget Worksheet</b>	Complete and submit <b>Attachment 1</b> with your application submission. Complete in excel or word. Only fill in blue cells. Use Notes section. Consult Eligible Project Costs in IM Section E5.
	6	<b>ATTACHMENT 2: Infrastructure Site &amp; Needs Profile Worksheet (when applicable)</b>	<b>When applicable</b> , complete and submit <b>Attachment 2</b> with your application submission <b>if you are requesting funding for any of the following categories of infrastructure:</b> Level 2 or DC Fast Charger EVSE, Bicycle and Scooter infrastructure, Solar Photovoltaic Equipment, and/or Hydrogen Fueling Infrastructure.
	7	<b>ATTACHMENT 3: Team Profile Worksheet</b>	The Lead Applicant is responsible for gathering information from all sub-applicants and completing and submitting <b>Attachment 3</b> with your application submission. Not required if no sub-applicants.
<b>LETTERS OF SUPPORT &amp; COMMITMENT</b>	8	<b>LETTERS OF COMMITMENT FROM EACH SUB-APPLICANT / TEAM MEMBERS</b>	Letters of Commitment are required to be compiled by the Lead Applicant <b>from each sub-applicant and project team member, including all third-party sub-contractors</b> and submitted with the Lead Applicant's application submission. Each letter must include each sub-applicant's specific roles and responsibilities in the project, if the Lead Applicant has sub-applicants at the time of application submittal. The letter must express support and commitment to the Lead Applicant and for the proposed project. See sample letters.
	9	<b>LETTERS OF COMMITMENT FROM PUBLIC AGENCY (If Lead Applicant is Non-Profit)</b>	If the <b>Lead Applicant is a non-profit</b> , then a Letter of Commitment from a Public Agency is required with application submission. See sample letters.
	10	<b>LETTERS OF SUPPORT FROM COMMUNITY-BASED ORGANIZATION (If Lead Applicant is not a CBO)</b>	If the <b>Lead Applicant is not a community-based organization (CBO)</b> , a Letter of Support from a CBO is required. <b>A community-based organization is defined by the program as meeting at least 2 of the following definitions:</b> (1) The organization is place-based, with an explicit geographic focus area that includes the proposed project area; (2) Staff members, volunteers, or Board members reside in the community where the project is located; (3) The organization has a demonstrated track record of at least one year providing services in the proposed project area. <b>The Letter of Support from a CBO must both demonstrate project support and explain how they meet a minimum of 2 out of 3 of the program's above CBO requirements.</b> See sample letters.
	11	<b>LETTERS OF SUPPORT / COMMITMENT FOR SITE CONTROL / RIGHT-OF-WAY PERMISSION (If Applicant is not site owner / right-of-way holder)</b>	A Letter of Support/Commitment for Site Control / Right-of-Way Permission is required with application submission If your project involves infrastructure site improvements and the Lead Applicant is not the site owner/ right-of-way holder. See sample letters.
<b>SECRETARY OF STATE DOCS</b>	12	<b>SOS CERTIFICATE OF STATUS (Evidence of Active / Good Standing w/SOS)</b>	<b>For non-profit Lead Applicants, non-profit Sub-Applicants, and private organizations who are Sub-Applicants:</b> Provide your organization's evidence of Active/Good Standing Status with submission of a Certificate of Status from the Secretary of State. Access your Certificate of Status here: <a href="https://businesssearch.sos.ca.gov/">https://businesssearch.sos.ca.gov/</a> . If your Certificate of Status is unavailable, you may submit a screenshot of the SOS page that lists the ACTIVE status of your organization and the Registration ID. <i>Certain non-profits that are tribally chartered corporations under tribally enacted laws may be exempt from SOS registration.</i>
	13	<b>SOS STATEMENT OF INFORMATION (Evidence of SOS Registration and current status)</b>	<b>For non-profit Lead Applicants, non-profit Sub-Applicants, and private organizations who are Sub-Applicants:</b> Provide a Statement of Information (SOI) from the Secretary of State to demonstrate evidence of Registration with Secretary of State. You may access the SOI online here: <a href="https://businesssearch.sos.ca.gov/">https://businesssearch.sos.ca.gov/</a> . Your SOI should be current as of application submittal, which means that if your expiration date listed on the SOS page is prior to application submittal, you need to renew online. If you don't receive your revised SOI in time for application submittal, please submit a copy of an email (pdf) that shows that you submitted for renewal prior to application submission and that your Registration status is current.

	14	<b>ARTICLES OF INCORPORATION</b> (Evidence of at least 1 year Incorporation)	<b>For non-profit Lead Applicants, non-profit Sub-Applicants, and private organizations who are Sub-Applicants:</b> Provide a copy of your organization's Articles of Incorporation that were filed with the Secretary of State to provide evidence of at least 1 year of incorporation. This document may be available on the Secretary of State (SOS) website at <a href="https://businesssearch.sos.ca.gov/">https://businesssearch.sos.ca.gov/</a> , listed as a Registration document. Only if this document is unavailable to you and is not available on the website, you may provide (1) a screenshot of the SOS website page showing the earliest Registration document date, and (2) a copy of the earliest Registration document listed on the website.
FISCAL SPONSORSHIP CONTRACT	15	<b>FISCAL SPONSORSHIP CONTRACT</b> (For unincorporated non-profit Sub-Applicants not registered with Secretary of State)	<b>For unincorporated non-profit Sub-Applicants that are not registered with the Secretary of State:</b> These entities must provide evidence of a contract with a fiscal sponsor with their application submission. The fiscal sponsor must be tax-exempt under IRS Section 501 and tax-exempt under California state law and also registered and in active/good standing with the Secretary of State to perform financial management and administrative functions for them on their behalf.
IRS & TAX EXEMPTION	16	<b>IRS DETERMINATION LETTER</b> (Evidence of IRS 501 Status Exemption)	<b>For non-profit Lead Applicants and non-profit Sub-Applicants:</b> Submit your organization's IRS Tax Exemption Letter indicating their 501 status and date of exemption with your application submission. Consult the IRS website here <a href="https://apps.irs.gov/app/eos/">https://apps.irs.gov/app/eos/</a> to access a copy of the letter, if you do not have access to your letter. Only if your IRS determination letter is unavailable, you may submit a copy of Page 1 of your most recent Form 990 that shows the 501 status
	17	<b>CA FRANCHISE TAX BOARD EXEMPTION LETTER</b> (Evidence of State Tax Exemption)	<b>For non-profit Lead Applicants:</b> Provide a copy of your organization's California Franchise Tax Board's Exemption Letter indicating State Tax Exemption status and registration number. Find your State Tax Exemption Letter here: <a href="https://webapp.ftb.ca.gov/eletter/?Submit=Check+Status">https://webapp.ftb.ca.gov/eletter/?Submit=Check+Status</a> If your tax exemption letter is unavailable, you may submit screenshot pdf from the website showing State tax exemption status of EXEMPT with your organization and registration number.
TRIBAL STATUS	18	<b>TRIBAL AUTHORITY STATUS</b>	<b>For all Tribal Entities:</b> Provide documentation indicating your tribal status from the tribal authority (e.g. California or Federally or non-Federally recognized tribe). You may show a screenshot or pdf from the register or list of tribes or provide a copy of an official document that declares your status.
AFFORDABLE HOUSING	19	<b>RECORDED DEED / REGULATORY AGREEMENT</b> (Project area w/in eligible affordable housing)	Submit a copy of each eligible affordable housing property's deed/regulatory agreement <b>when your project area is entirely within an eligible affordable housing community</b> . For the CMO program, an eligible affordable housing community must be within an AB 1550-designated low-income community. In addition, the housing facility must meet the following criteria: (1) the property must have at least 5 units; and (2) the property must be a deed-restricted low-income residential housing, where at least 80% of property residents have incomes at or below 60% of the area median income.
SITE CONTROL	20	<b>SITE CONTROL AGREEMENTS</b> (For DC Fast Chargers & H2 Fueling Infrastructure sites)	If you seek funding for DC Fast Chargers & Hydrogen Fueling Infrastructure, you must have already identified the location where the infrastructure will be sited and have permission to use that site at the time of application submittal. <b>Site control agreements for DC fast charger &amp; Hydrogen Fueling Infrastructure are due with application submittal.</b> Site control agreements for bike / scooter infrastructure and Solar PV equipment are required prior to voucher execution & optionally at application submittal.
<b>POST-AWARD DOCUMENTS (REQUIRED PRIOR TO VOUCHER EXECUTION)</b>			
CONTRACTS, DOCUMENTS, AND APPROVALS	1	<b>MOBILITY PROVIDER CONTRACT</b>	A copy of the mobility provider contract with the Lead Applicant is required <b>post-award or within 3 months of voucher execution</b> . The mobility provider contract is not required to be submitted with your application submission.
	2	<b>BOARD RESOLUTION</b>	<b>Prior to voucher execution</b> , an approved resolution or documentation of approval of the project from the governing board, agency, council, tribal council or tribal chairperson is required that commits the agency/organization/tribe to comply with the requirements of the program; to accept the funds; and to allocate any funding that the awardee has committed to be part of a project application. A tribal council can refer to the tribal governing body or primary decision-making executive, such as President/Governor, but must be the highest level of leadership within the tribal unit, individually or as a council. <i>If the public agency or non-profit entity does not have a governing board, then a binding written commitment from an authorizing official of the agency/organization will be required to fulfill this requirement.</i>
	3	<b>PAYMENT MILESTONE SCHEDULE</b>	<b>Prior to voucher execution</b> , a payment milestone schedule (form provided by Program Administrator) is required to be submitted by the Lead Applicant, indicating the requested payment frequency, amounts, and schedule along with the project milestones (key activities) to be achieved over the duration of the voucher funding term.
	4	<b>OTHER REQUESTED DOCS</b>	Based on applicant type, project approach / model, additional requested documentation may be requested by the Program Administrator <b>prior to voucher execution</b> (e.g. Permits, Fiscal Sponsorship Agreements, Sub-Contractor agreements, Conflict of Interest Form, Confidentiality Agreement, etc.)
	5	<b>SITE CONTROL AGREEMENTS / COPIES OF ISSUED RIGHT-OF-WAY PERMISSIONS</b>	<b>For infrastructure funding requests when the applicant is not the site owner or public right-of-way holder</b> , copies of site control agreements and issued right-of-way permissions (that have not been previously submitted) are required <b>prior to voucher execution</b> .
	6	<b>CERTIFICATES OF INSURANCE</b>	<b>Certificates of Insurance are required prior to voucher execution.</b> See Complete Requirements in Sections Z.1.n.1 and Z.1.n.ii of IM.
TRIBAL DOCUMENTS	7	<b>BUREAU OF INDIAN AFFAIRS (BIA) CONSENT</b>	
	8	<b>LIMITED WAIVER OF SOVEREIGN IMMUNITY</b>	For Federally Recognized/Controlled Tribes only. See IM Section V2bii for requirements.