MOBILITY PROJECT VOUCHER
SAMPLE APPLICATION

FOR THE
CLEAN MOBILITY VOUCHER PILOT PROGRAM
This document is a hypothetical example of an approved Mobility Project Voucher application. While consistent with the program eligibility criteria outlined in the CMO Implementation Manual (IM), voucher applicants should view this document as a guide to answering application questions and not as a prescriptive process to approach answers to questions. Furthermore, requirements for application attachments vary depending on who is the lead applicant and where the project is located. Please reference the Mobility Project Voucher APPLICATION CHECKLIST to ensure that applicants are submitting all required documents. A sample application checklist is attached to this document.

All sample responses are entered in green. If any questions arise when using this document, please contact the CMO Program Administrator Team as noted on the “Program Support” page above.

Table of Contents

MOBILITY PROJECT VOUCHER SAMPLE APPLICATION

FOR THE
CLEAN MOBILITY VOUCHER PILOT PROGRAM

PROJECT TEAM PROFILE ................................................................................................................................. 4
PROJECT NARRATIVE ........................................................................................................................................... 9
COMMUNITY TRANSPORTATION NEEDS ASSESSMENT .................................................................................. 16
PROJECT AREA PROFILE ..................................................................................................................................... 25
PROPOSED BUDGET AND PLAN FOR FINANCIAL SUSTAINABILITY .............................................................. 27
COMMUNITY RESOURCE CONTRIBUTION ...................................................................................................... 30
COMMUNITY OUTREACH PLAN .......................................................................................................................... 31
ATTESTATIONS AND SIGNATURE ....................................................................................................................... 34

ATTACHMENT 1. Mobility Project Voucher Budget Worksheet Sample
ATTACHMENT 2. Infrastructure Site and Needs Profile Worksheet Sample
ATTACHMENT 3. Team Profile Worksheet Sample
MOBILITY PROJECT VOUCHER APPLICATION

To apply for a Mobility Project Voucher, please complete this application by answering all required questions in the boxes, provide all relevant documentation and signatures, and submit the application to the Program Administrator in accordance with the eligibility terms and other requirements set forth in the CMO Implementation Manual. Answers to the application questions will be evaluated and determined to meet or not meet the minimum eligibility criteria set forth in the CMO Implementation Manual. Answers are not scored using a points-based system.

All fields with numbered questions are required. Questions lettered and in blue font are conditional questions that may be required based on certain previous responses. There is no minimum or maximum word count for individual questions or the application as a whole. All applications must include the following attachments with their application using sample worksheets provided herein. The electronic copies are available on the CMO website at www.cleanmobilityoptions.org.

Attachment 1. Mobility Project Voucher Budget Worksheet
Attachment 2. Infrastructure Sites and Needs Profile Worksheet
Attachment 3. Team Profile Worksheet

In order to be evaluated, the entire application must be completed and submitted as one package, including all required attachments; incomplete applications may not be considered. Applications submitted outside of the application submission window will also not be considered.

All information and data submitted in this application are the property of CARB and will become a public record under the Public Records Act (California Government Code Section 6254 et seq.) once the applicant has submitted the application. Do not include any personally identifiable information such as project staff home addresses, personal phone numbers, or personal email addresses. The Program Administrator may require additional documentation or clarification if needed.

If you need this document in an alternate format or language or to request other assistance with submitting the application, contact CALSTART at 626-744-5670 or by email at info@cleanmobilityoptions.org. If additional space is needed in any section of the application, please attach a separate sheet.
PROJECT TEAM PROFILE

This section collects information about the project team.

1. Lead applicant (“you” or “your”) general contact information: (write in)

| Organization Name/ Agency Name/ Tribe Name: CleanTech Incubator | Authorized Representative Name: Juan Doe |
| Project Lead Contact Name and Title: Yingling Davidson, Research Manager | California-Based Affiliate Contact (if different from the Lead Contact Name): |

Person with Contract Signing Authority (if different from above):

| Street Address or P.O. Box: 321 First Street, Suite 101 |
| Organization City/Town: Zenith Beach | Zip Code: 90000 |
| Project Lead Phone: 555-555-2345 | Project Lead Email Address: Dojuan@email.org |

Mailing Address (if different):

☒ 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 Voucher Sample Voucher Agreement).

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

| Printed Name of Responsible Party: Juan Doe | Title: Executive Officer |
| Signature of Responsible Party: | Date: October 10, 2020 |
2. **Please select your organization’s type:**

   (select one)

   - ☐ **Public agency.** For example, City, County, Metropolitan Planning Organization, Council of Government, local or regional transit agency, local air quality management district, air pollution control district, public school district.
   - ☐ **California Native American Tribe.** A Federally Recognized Tribe in California listed on the most recent notice of the Federal Register and other non-federally recognized California tribal governments, including those listed on the California Tribal Consultation List maintained by the California Native American Heritage Commission
   - ☒ **Non-profit organization.** The non-profit organization have been incorporated for at least one year prior to the time of voucher application submittal and with at least one full-time staff person based in California

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.**

   Cleantech Incubator is a non-profit organization dedicated to advancing the use of affordable clean technology statewide.

   Our core programming is focused on assisting sustainability entrepreneurs bring their products to market, with particular focus on supporting diverse communities within the startup ecosystem. In addition to this 18-month rotational program, CTI hosts meetups and quarterly workshops geared towards aspiring women, minority, LGBTQ+ founders. CTI has an ongoing partnership with California University’s Extension Education Services for regional meetup events focused on entrepreneurship in rural communities (many of which are in low-income) and with the CU Office of Student Support for targeted outreach to student veterans.

   CleanTech Incubator’s offices are located in both a SB 535 Disadvantaged/AB 1550 Low-Income Community qualifying neighborhood of Zenith Beach. Two full-time staff are dedicated to recruiting locals to CTI’s entrepreneurship rotational program. Related community outreach and engagement includes partnerships with local K-12 and higher-education institutions for participation in CTI’s summer internship network, class lectures from professionals working in sustainability and environmental justice, and extracurricular training courses for industry-recognized credentials in the clean energy sector.

4. **Does your application include a sub-applicant(s)?**
(select one)
☒ Yes
☐ No

Note: Sub-applicants are entities other than the lead applicant who enter into a partnership with other eligible organizations to apply for voucher funds. Sub-applicants may include but are not limited to organizations that provide clean mobility services, EVSE and other related infrastructure, community outreach services, and technical assistance. Sub-applicants may be public, private, or non-profit organizations or tribes. A single entity may participate as sub-applicant in multiple applications.

Conditional (4a):

a. If your application includes sub-applicants, please attach a Team Profile Worksheet (Attachment 3) and write, “attached” in the box below with any comments.

ATTACHED

This proposal includes several partners: CleanTech Incubator (CTI) as Lead Applicant and Dashboard Solutions, Community Housing Solutions, and PowerGrid Plus as sub-applicants. For more details on each partner organization, their qualifications and experience, and contact information please see Attachment 3.

- **LEAD APPLICANT: CleanTech Incubator** is a non-profit based in Zenith Beach, which for the last six years has provided capital and technical support to California clean tech entrepreneurs. As the lead applicant, Cleantech Incubator serve as the voucher project manager, leading procurement and fundraising efforts.

- **SUB-APPLICANT 1: Community Housing Solutions**, the project’s lead community-based organization, will support community outreach and awareness efforts as well as oversee day-to-day participant engagement and enrollment. CHP’s property, Oak Point, is within an AB 1550-designated low-income tract (as well as SB 535 eligible DACs) and meets the program qualifications as a deed-restricted, low-income rental property.
  
  o Please see Q16b response for details on how the property meets program requirements for a deed-restricted, low-income affordable housing property.

- **SUB-APPLICANT 2: Dashboard Solutions** is an enterprise commute trip reduction (ECTR) software and mobility operator based out of CTI. Dashboard brings two years of experience providing turnkey support to zero-emission fleet operators and four years of experience of using its web ECTR platform to help communities and
organizations of all size find the transportation options that best meet their trip needs. Dashboard Solutions will work directly with Community Housing Solutions on service design, implementation and technical operations of ‘Primed-to-Prosper.’

**SUB-APPLICANT 3: PowerGrid Plus** is an energy management startup specializing in retrofits and new construction off-grid residential and commercial properties. PowerGrid Plus will work closely with the ‘Primed-to-Prosper’ team on equipment procurement, design, permitting and construction, as well as technical support during operations.

Note: If applicable, you must include a description of the team’s qualifications, such as history of local engagement, key areas of expertise, or concrete examples of applicant representing or advocating in and for their community.

5. What is the name of an organization on your team with at least one year of experience operating mobility services (experienced partner), and what role they play?

<table>
<thead>
<tr>
<th>Provide the name, title, and contact information of the individual, their affiliation/organization: Alex Yoon, Development Lead at Dashboard Solutions, <a href="mailto:AlexY@email.org">AlexY@email.org</a>) or 555-213-5678</th>
</tr>
</thead>
<tbody>
<tr>
<td>(select one)</td>
</tr>
<tr>
<td>☐ Self</td>
</tr>
<tr>
<td>☒ Sub-applicant</td>
</tr>
<tr>
<td>☐ Don’t know yet; will select from the Mobility Provider Directory, or an entity who meets the minimum qualification criteria, and contract within 3 months of the voucher agreement execution date.</td>
</tr>
</tbody>
</table>

Note: Each team must include an organization with at least one year of experience operating mobility services. This organization may be the entity operating the proposed service, or it may serve in another capacity such as project technical advisor. If the experienced partner is not included on the project team as lead applicant or sub-applicant at the time of application, the lead applicant must commit to contract with either an entity listed in the Clean Mobility Provider Directory or an entity who meets the minimum qualification criteria to be on the Directory but not currently listed, within 3 months of the voucher agreement execution date. All mobility providers listed in the Directory have been screened to ensure they meet the minimum level of experience to satisfy this requirement.

Conditional (5a):

a. 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.
Dashboard Solutions was founded in 2016 as a Software as a Service (SaaS) company seeking to empower communities and organizations of all sizes to find alternatives single occupancy driving. During these first two years, Dashboard worked with mid-size employers, both in the public and private sectors, to implement ‘white-label’ applications to help manage organizational transportation benefits, ranging from pre-tax travel deductions and employee carpool matching to on-site bikeshare. Clients include Digital Cartography Inc’s offices in Ventura and Mountain Bar’s headquarters in Sacramento. Dashboard and CTI were able to raise funds in 2018 to help evolve the business to offer a complete ‘Mobility as a Service’ (MaaS) platform with flexible electric vehicle leases to fleet managers.

During recent ‘stay-in-place’ orders, Dashboard worked with several communities in the Los Angeles area to provide scheduled delivery service with an indoor farmers market and local food shelve.

After conversations with numerous developers who were interested in using on-site transportation options as a means to attract residents, we hope Primed-to-Prosp (P2P) can provide a ‘proof-of-concept’ for this kind of service.

6. Do all partners included in your application team have full support and approval from decision-makers in their organization (e.g. Board of Directors, City Council, Tribal Council, or other governing body, etc.) to participate in the project as proposed?

(select one)

☐ Yes
☒ No

Note: Applications may be processed pending final approval from internal decision-makers; however, proof of approval is required prior to signing the voucher agreement.

Conditional (6a):

a. 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.

The bylaws of the CleanTech Incubator do not require Board of Directors approval for submitting funding applications, but does require approval for accepting awards over $500,000. If awarded a voucher, the Incubator will request Board approval at its first monthly Board meeting after the award.
PROJECT NARRATIVE

This section collects information about the project proposal. The project should aim to equitably improve communities’ access to clean mobility options that are safe, reliable, convenient, and/or affordable while reducing greenhouse gas emissions and air pollution. The project must be based on identified community transportation and mobility needs. Applicants must describe the activities that were taken to assess community transportation needs in a subsequent section.

7. Please describe the project proposal.

The primary objective of Primed-to-Prospér (P2P) is to improve community mobility with electric microtransit and bikeshare, supplemented with increased access to public transit options. Instead of just promoting alternative transportation options at the workplace, P2P takes the novel approach of bringing Dashboard Solution’s experience with employer-based Travel Demand Management (TDM) to where journeys start—the homeplace. To this end, a secondary goal is test and showcase a new service model that interested developers and property managers can employ to create more spatially efficient multifamily dwellings.

Community Housing Solutions (CHP), as statewide non-profit housing developer is one such interested group. In addition to expanding opportunity to the 480 low-income households at its property in Metson, a rural community where scarce public transit options seldom offer a reliable form of transportation, Community Housing Solutions hopes to support local workforce development by hiring from within the community.

Transportation Services

In response to a Community Transportation Needs Assessment conducted earlier this year (for more details please see the needs assessment section of the application), P2P will provide an ADA-accessible electric shuttle service, running on both weekdays and weekends, available to resident participants as part of a monthly subscription. Shuttle service will tentatively be provided using a 2019 Lightning System Ford E-450 shuttle, which is listed as an eligible vehicle in CARB’s HVIP program, and leased from Dashboard Solutions. By leasing, instead of purchasing, we hope P2P will be able to leverage future improvements in electric technology and ensure the greatest flexibility. The service will be operated by residents of Oak Point (see references to ‘Resident Transportation Coordinators’ in the Community Outreach section and elsewhere) and will run on a schedule during core hours during the weekday. Electricity used to power the shuttle from the DC fast charger will be covered by the program for the first two years of operation, per the recent addition to the CMO Implementation Manual 2.0.
To maximize vehicle usage, P2P’s shuttle will operate on a hybrid service model. The first priority of P2P will be to make sure that employees are able to reach their workplaces. At present, residents travel to several clusters of employers which could be served in a vanpool or shuttle capacity. Early morning shifts to agricultural fields and wine-processing jobs outside of the city start at 6:00am and end in the afternoon between 2:00 and 3:00 pm. A loop between the residential complex and employment sites could be accomplished in 45 minutes. Shifts at the food processing employment center to the south (26 min) start around 7:30 to 8 am and end at 4:30 to 5pm.

Routing and scheduling will be semi-structured and adjusted on a weekly basis according to the needs of riders. During off-peak afternoon hours and weekends, the shuttle will be available for other essential trips, such as shopping or medical appointments. Reservations and scheduling will be more flexible than the weekly workplace routes and will be reservable 24 hours in advance. To accommodate different mobile technologies, reservations and scheduling can be conducted through text-message and Dashboard Solution’s web platform, as well as toll free phone number to accommodate different technical accessibilities.

If there is sufficient demand for expansion, the project will examine enrolling members throughout the City of Metson in P2P, including in areas beyond the Oak Point housing project area. If the service expands in this manner, it trips serving members outside Oak Point will account for no more than 20% any given week—in accordance with the ‘80/20’ rule in the CMO Implementation Manual (section D2, ‘Infrastructure Siting and Service Locations).

Complementing the P2P shuttle service will be access to a variety of transportation amenities, including access to a bicycle ‘lending hub’ in the gated residential parking garage at Oak Point. The hub will consist of shared electric (class 1) bicycles available for daily rentals (essentially following the ‘bike library’ model) available to Oak Point residents who enroll in the monthly P2P subscription. The hub will also include bike tune up station available to all building residents. Bikes will require overnight charging, include built-in cargo storage and will come in different sized frames. Attachable child seats will be available for check-out at the Oak Point front desk. The bikes will not require stations and will use locks are integrated into the frame.

In addition to the core project models described above, there will be an additional transportation enhancement that we would like to pursue. P2P will work with the County Transit Authority to purchase transit passes for Oak Point residents who enroll in the monthly P2P subscription as a means to supplement the shuttle and bike lending hub. As an enrollment incentive, monthly transit passes will be discounted for the first two years of operation.
P2P members will choose how they use all of these services through credits in a ‘digital wallet’ tied to their Dashboard Solutions account and reloaded by CHP when processing monthly rent, similar to how some organizations manage their employee transportation benefits. P2P users can manage their account online through their own digital device, or at one of Oak Point’s community computers, or through paper forms distributed by on-site administrative staff. To reflect levels of use between members and maximize flexibility, credits will be available in different bundles/pricing tiers.

**Supporting Infrastructure**

Community Housing Solutions will work with **PowerGrid Plus (PGP)** to install and maintain an 8-kilowatt (kW) array of solar photovoltaic panels on the rooftop of Oak Point. These solar panels will feed into an inverter to convert the direct current (DC) electricity to alternating current (AC), which will be used to power the ‘lending hub’ in Oak Point’s parking deck and the 110-volt outlets powering the electric bikes. Since the community has net metering, any net excess solar electricity will be fed back to the local grid and credited by Oak Point’s utility provider. CleanTech Incubator will contract with an electric vehicle service equipment (EVSE) provider to install and maintain a 50 kW DC fast charger in Oak Point’s small surface lot, currently dedicated to staff and delivery drop offs.

**Community Outreach**

Community Housing Solutions will also hire two on-site **Resident Transportation Coordinators** from local residents to help enroll residents in P2P and the Dashboard Solutions platform, as well as operate the shuttle service. CHP will reimburse candidates for expenses related to passing the necessary exams and obtaining the relevant permits for shuttle operations. Drivers will need a ‘Class B’ license with a DMV Passenger Endorsement, which involves studying for a 20-question knowledge test of the ‘California Commercial Driver Handbook’ and a ride-along skills test with a DMV employee. By hiring in the community, we hope to provide residents with a trusted source of information about mobility options—a sort of in-person ‘transportation toolkit’ to balance out the digital focus of the Dashboard Solution’s platform.

Community Housing Solutions will hold a series of five meetings with residents early in the first planning year to provide input on structural details of Primed-to-Prosper, including pricing tiers, scheduling protocol, and program branding. We propose incentivizing participation in these meetings with bank-issued gift-cards. Input on these questions will also be solicited through a paper survey that can be left in the Oak Point management office, much like how the initial needs assessment was carried out.
Note: 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?**

8. **What are the core project model(s) included in your project?** (If applicable, enter percentage amount of voucher funds allocated to each model):

<table>
<thead>
<tr>
<th></th>
<th>Carsharing</th>
<th>Bike or Scooter-sharing</th>
<th>Carpooling</th>
<th>Vanpooling</th>
<th>Innovative transit services</th>
<th>Other ride on-demand services</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>

Note: Projects support by CMO voucher funds must be based on one or more core project models listed here. Please see Section E. Project Eligibility in the CMO Implementation Manual for definitions and eligibility criteria.
9. Which of the following categories of infrastructure does your proposal include?

<table>
<thead>
<tr>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Level 2 Electric Vehicle Supply Equipment (EVSE)</td>
</tr>
<tr>
<td>☒ DC Fast Charging Equipment</td>
</tr>
<tr>
<td>☒ Bicycle and Scooter Infrastructure</td>
</tr>
<tr>
<td>☒ Solar Photovoltaic (PV)</td>
</tr>
<tr>
<td>☐ Hydrogen Refueling Station</td>
</tr>
<tr>
<td>☐ None</td>
</tr>
</tbody>
</table>

Conditional (9a):

a. 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.

Attached in the Infrastructure Site and Needs Profile Worksheet

10. Does your project include any additional transportation enhancements that are not listed in Section E.3 of the Program Implementation Manual?

<table>
<thead>
<tr>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Yes, and I hereby request an approval.</td>
</tr>
<tr>
<td>☒ No, our project includes a proposed additional transportation enhancement that is listed in the Implementation Manual.</td>
</tr>
</tbody>
</table>

Conditional (10a):

a. If yes, please explain the proposed transportation enhancement.

(write in)

Note: Additional transportation enhancements are intended to be supplemental and not essential to the core project model. If your enhancement is not approved, the project should still be able to operate effectively. The Program Administrator may require additional information and data to evaluate your request.

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.
The project development will take place over 1 year. The project launch will follow, allowing 6 months for completed launch activities. Once both of these phases are complete, operation and maintenance begin. Presented key activities align with our project milestones in quarterly groups.

Phase 1: Planning and construction (1 year)
1–3 months after project approval and voucher execution:

- **Milestone 1:** Establish a Community Advisory Panel  
  **Activities:** Dashboard Solutions will work with Community Housing Solutions to establish a Community Advisory Panel (CAP). The CAP will assist with the initial program design and recruitment of two Resident Transportation Coordinators from Oak Point and/or the surrounding community. As part of the program budget, we propose compensating members of the panel with bank-issued gift-cards for each meeting they participate in.

- **Milestone 2:** Procurement of a contractor (local prioritization) to build Lending Hub  
  **Activities:** CleanTech Incubator will lead the procurement for a local contractor (if possible) to build the ‘lending hub’ in the Oak Point residential parking garage.

- **Milestone 3:** Engage with regulatory and permitting agencies  
  **Activities:** PowerGrid Plus will engage with the relevant regulatory and permitting agencies for the installation of the DC fast charger and rooftop solar panels.

4-6 months after project approval and voucher execution

- **Milestone 4:** Begin Community Outreach  
  **Activities:** Community Housing Solutions, Dashboard Solutions, and the Community Advisory Panel will begin engaging Oak Point residents to identify preferences around critical terms and conditions such as subscription tiers and pricing, program enrollment and obligations, trip scheduling and reservation, and how the service is branded in the broader community—if at all. Specific attention will be paid to reaching residents that were not able to participate during the initial Community Needs Assessment in the spring of 2020. Outreach will take the form of paper surveys, in the same manner as the needs assessment process, along with five in-person or virtual group meetings.

- **Milestone 5:** Recruit and Train two Resident Transportation Coordinators  
  **Activities:** Dashboard and CHP will train two Resident Transportation Coordinators on the essentials of the P2P service and provide administrative/financial support for any necessary state exams or permits.
• **Milestone 6**: Begin construction of the Lending Hub  
  **Activities**: The procured contractor will begin work on constructing the Lending Hub.

• **Milestone 7**: Install the DC fast charger:  
  **Activities**: PowerGrid Plus will begin the installation of the DC fast charger in the staff parking lot as well as the rooftop photovoltaic panels, inverter, and wiring to the garage or ‘Lending Hub.’

• **Milestone 8**: Procure Electric Bike Vendor  
  **Activities**: CleanTech Incubator will lead the procurement process for an electric bike vendor. Once the balance between electric bike (cargo, child and regular adult) types is determined based on the community’s feedback, CleanTech Incubator will place the order.

• **Milestone 9**: Develop and conduct initial outreach and marketing  
  **Activities**: CHP and CTI will work with the Resident Transportation Coordinators to develop the in-person ‘transportation toolkit’ materials, raise program awareness, and invite feedback on shuttle stops and scheduling.

**7–9 months after Project Approval and Voucher Execution**

• **Milestone 10**: Equipment in Place and Operational Training Completed  
  **Activities**: All bikes, secure storage, and bike maintenance equipment will be in place. Once installed, the DC fast charger will allow for the shuttle to be brought on site. Resident Transportation Coordinators will also receive any necessary operational training.

• **Milestone 11**: Begin Program Enrollment  
  **Activities**: Dashboard and CHP will begin engaging the community to encourage program enrollment.

**10 – 12 months after Project Approval and Voucher Execution**

• **Milestone 12**: Complete Construction of Lending Hub and Associated Infrastructure  
  **Activities**: All construction completed, materials procured, and the Lending Hub will be ready for the project launch.

**Phase 2: Project Launch (6 months)**
1-3 months after completed planning and construction
- **Milestone 13**: Household enrollment in P2P
  - **Activities**: Enroll 100 households in the P2P shuttle program
- **Milestone 14**: Delivery of All Vehicles

3-6 months after completed planning and construction
- **Milestone 16**: Explore Additional Revenue Sources
  - **Activities**: The Community Advisory Panel will engage with employers to explore additional revenue sources, such as the use of the DC fast charger or additional grants or sponsorship.

Phase 3: Operations and Maintenance (4 years)
- **Milestone 17**: Quarterly CAP Meetings
  - **Activities**: The CAP will meet quarterly through the duration of the Voucher Agreement to discuss operational issues as they may arise.

COMMUNITY TRANSPORTATION NEEDS ASSESSMENT
This section collects information about the applicant’s activities to understand the transportation needs of residents in the area consistent with the program requirements set forth in the CMO Implementation Manual. Applicants must demonstrate that the proposed project is responsive to transportation needs and community preferences for the transportation solutions identified through meaningful, broad-based engagement. The community transportation needs assessment must be completed by the time of application submission and be a basis for the project idea. Applicants may rely on existing assessments and activities done in past 4 years if they are consistent with the requirements and conditions as defined. The entire project area must be represented in the Community Transportation Needs Assessment.
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 your analysis.

The regional planning authority encompassing Metson has increasingly supported intersectional planning efforts that address mounting climate and housing challenges. According to Households transportation characteristic indicators from the Bureau of Transportation Statistic’s Local Area Transportation Characteristics for Households dataset, low-income households in the region spend an average of 54% of their annual income on housing and transportation, line items that are only set to increase in the coming years.

After learning about the Clean Mobility Options program in January of 2020, CleanTech Incubator engaged Community Housing Solutions about the possibility of a proposal. In the coming months, CleanTech Incubator and Community Housing Solutions developed a comprehensive transportation survey for residents of Oak Point, based in part on the example provided at cleanmobilityoptions.org (the survey is included in ‘CTNA Attachment’ along with the overall summary).

In March, Community Housing Solutions delivered paper household surveys to each unit along with informational pamphlets explaining CMO (these also included background and instructional information about the 2020 Census). Both were offered in English and Spanish, most common languages among Oak Point residents. The surveys were paper questionnaires given to all units and that were returned by 52% of rented low-income units (247 household surveys). For residents that offered to participate in follow-up interviews, over-the-phone focus groups were held in May (along with several one-on-one interviews for those unable to attend the first call).

CleanTech Incubator assisted in the desk review of the following quantitative data from several public tools:

1. Employer household data from the Longitudinal-Employer Household Dynamics tool maintained by the US Census. LEHD shows aggregated demographic characteristics of workers (age, gender, education, race, and ethnicity) and businesses (industry, location, firm size and age). By pairing wage records used for unemployment insurance with workers addresses, LEHD is also able to approximate commute patterns.

2. Housing and transportation stability indicators from the Opportunity 360 tool created by Enterprise Community Partners. The tool measures 200 indicators between five categories of ‘opportunity,’ housing stability, education, health and well-being, economic security and mobility.
3. Housing affordability indicator from the Housing and Urban Development’s Location Affordability Index. Among other household costs, this measures how much a typical household spends on rent.

4. Households transportation characteristic indicators from the Bureau of Transportation Statistic’s Local Area Transportation Characteristics for Households dataset. Among other details, this dataset estimates annual household trips and vehicle miles traveled.

Note: 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 from section b below). 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. U.S. 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.

A complete list of all indicators and how to access them is available on the CMO website at https://www.cleanmobilityoptions.org/project-development-tools/

13. Based on your Transportation Data Analysis, what are the community’s main travel patterns and transportation gaps?
Below, our Transportation Data Analysis is sorted by individual indicators.

Existing transit/clean-shared mobility:

- The residential complex selected for P2P is a great example of transit-oriented development in a rural/small-town setting. It is a half mile away from the city’s primary transportation hub—a commuter rail station served three times a day. This station also serves as the pick-up location for inter-city bus service.

- Local bus service consists of several circulators that run during working hours (approximately 8am to 5pm) on the weekdays and in the mornings on weekends. Buses run about 60 minutes apart from each other.

- ‘Dial-a-ride’ paratransit is available through the county to a subset of riders.

Economic ‘stability’ from Enterprise Community Partners’ online map:

- ‘Housing stability’ average of six standardized variables: Homeownership Rate, Percent of All Low-Income Households that are Severely Cost-Burdened, Percent of Occupied Units that are Crowded or Overcrowded, Percent of Households that have Multiple Families or Unrelated Individuals, Percent of Renter Households Receiving Project-Based Housing Assistance, and Percent of Renter Households Receiving Housing Choice Voucher. The tract (06602900001) scored in the bottom 10th percentile nationally, indicating high rent burdens and risk of displacement.

- ‘Transportation stability’ is similarly based on a composite score of several variables: Average Travel Time to Work (in minutes), Percent of Workers Who Commute Over an Hour, Percent of Workers Who Commute to Work using Public Transit, Percent of Workers Who Commute to Work by Walking, and Percent of Households for Which No Vehicles are Available. The tract (06602900001) scored in the bottom 20th percentile nationally, indicating high transportation burden.

Three indexes were used from the US Census:

- From the Housing and Urban Development’s Location Affordability Index, 86% of households are renter-occupied and the median rent is $1,341 per month.
According to survey-based modeling from the Bureau of Transportation Statistics’ Local Area Transportation Characteristics for Households, it is estimated that renter-occupied households spend $8,000 a year on transportation, about $6,000 of which is due to fueling and other driving-induced costs.

Considering that median income for a renting household is estimated to be $44,455 per year, this would indicate that as much as 53% of household income is spent on housing and transportation.

Accordingly, Longitudinal – Employer Household Data (LEHD) indicates about 70% of jobs in the community pay less than $40,000 a year. The two most dominant categories of employment were blue collar jobs in ‘goods producing’ (42%) and in ‘trade, transportation and utilities’ (29%).

LEHD data shows that, at most, 28% of jobs are within comfortable walking or biking distance of Oak Point (2 miles). The tract with the highest concentration of jobs, about 24%, extends several miles outside of town (see below).

By introducing a shuttle service, operating largely within a four-mile radius of Oak Point, up to 55% of jobs can be reached.

Note: 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.
14. What types of meaningful, representative, community engagement activities have been conducted to assess the community’s transportation needs? (The response must include at least two types of engagement activities).

1. Staff designed a paper survey with 12 questions, some that overlapped with the indicators used in the desk review (and meant to validate those results) and others unique, such as the perception and willingness to use shared mobility services. Residents at Oak Point receive monthly newsletter distributed in English and Spanish. Included in the April, 2020 edition was a 12-question paper survey with a short explanation of the Clean Mobility Options program. Residents were instructed to drop their completed surveys at the front desk. Anecdotally, staff at Oak Point felt that the state ‘stay in place’ directives improved response rate.

2. About 90% of the surveys indicated a willingness for follow-up interviews. About one out of five households were selected for a diversity in age and ethnicity/language preference, as well as if they were single-vehicle households, used public transportation, were interested in cycling, and had children.

3. The period during which the survey and follow-ups were issued were amidst a state ‘shelter-in-place’ order, so focus groups and interviews were conducted over the phone between May 8th and 22nd during the dinner hour. There were eight focus groups with an average of eleven participants each. Focus groups were based around 12 open-ended questions. Participants were given $30 gift cards for their time. A total of 88 residents were interviewed in May.

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. The purpose of holding at least two engagement activities is to increase opportunities for stakeholder residents to provide input. For each, include the approximate date, location, and number of attendees or participants, and what measures were taken to ensure that the combination of activities provided residents with an equitable opportunity to participate.

15. What were the main transportation and mobility needs identified by the community engagement activities outlined? Describe in detail.
Below is a selected summary of information received from resident surveys. Out of 246 of survey responses (one survey had to be discarded due to lack of completion/contact information):

- **Household income**
  - 10% make under $20k
  - 30% make between $20 and $35k
  - 15% make between $35 and $50k
  - 20% make between $50 and $65k
  - 15% make between $65 and $80k
  - 10% make above $80k

- **Employment status**
  - 25% not working
  - 25% working part-time
  - 50% working full-time

- **Top employers (in order of distance, not total employment)**
  - Dr. Brule’s Vineyards = 6 miles west, requires crossing a high-volume road
  - Animal Crossing Farms = 5 miles west, over the same busy crossing
  - Pulp Fact Orchard = 4 miles north east, crosses another high-volume road
  - Vegetarian’s Delight Foods Processing = 2.5 miles south on a frontage road
  - Mitchell’s Turtle Sanctuary = 2 miles south along the same road
  - St. Vincent’s Hospital = 2 to 2.5 miles east, largely on a safe bike route
  - Health Insurance Stuff Group = 1 to 1.5 mile east, closer along the same route
  - Metson School District = 1 to 1.5 mile east, near downtown Metson
  - New Dayton’s (plus other large retailers) = 1 to 1.5 mile east, also near downtown
  - Metson Civic Center = 1 mile east in downtown Metson

- **Vehicle ownership per household**
  - 16% did not own a vehicle
  - 44% had one vehicle
  - 34% had two vehicles
  - 6% no response

- **Average monthly household transportation expenditures (for car owning households)**
  - Average was $1,200
Many saw public transportation as the best alternative to driving their own vehicle, but were generally unfamiliar with local routes. The idea that resonated the most was a low-cost or free shuttle to key employment and commercial destinations. Residents were interested in bicycling, but felt that current bike facilities left them vulnerable to theft. Residents, particularly those with one or fewer vehicles, faced similar challenges around transportation: balancing the need for a car to get to work with other demands during the day, such as appointments and essential shopping trips. Several had dealt with under-employment in light of the COVID-19 pandemic and were eager to learn about how P2P might help open up opportunities to reduce household expense or open up opportunities for other employment.

Note: The response should provide a comprehensive description of the range of transportation needs identified through community engagement, including those not addressed the proposed project. Needs describe the problem, obstacle, challenge, or “gap;” rather than the solution itself. Please address in particular:

a. What transportation needs have been expressed?
b. What were the most commonly expressed transportation needs?
c. Which of these needs does your project address?
d. If your proposal does not address the most significant needs, why not?

16. How does your proposed project contribute to addressing the needs and preferences for transportation solutions expressed by the community in the needs assessment?

The residents of Oak Point were enthusiastic about the concepts behind Primed-to-Prosper (P2P) and our proposal tries to reflect community preferences. From the survey:

- Top two transportation amenities you would like to see
  - Free or low-cost shuttle - 87%
  - Monthly transit pass - 84%
  - Lyft/Uber Rides - 81%
  - Carshare - 58%
  - Bikeshare - 48%
  - Scootershare - 39%

While carshare scored highly in the paper survey, follow-up focus groups revealed a general misunderstanding of the concept; most had never heard of the larger national operators.
Instead, carsharing had been mostly interpreted as casual or reoccurring carpools (which had been listed in the survey as ‘ridepools’). Below is a sample of quotes from focus groups:

- “The free public transit bus is really helpful to us (home to work). We would think discounted/free use of Lyft/Uber will definitely help us for our emergency and personal use of transportation. E-scooters is helpful for students here and e-bikes as well.”
- “It would be very good to share the trip with a neighbor. For example, take the children to school or pick them up. Also share the trip to the same store.”
- “For me I think is better use a bicycle, but maybe I use the faster share car.”
- “Most of us have kids so we need options were is easier to transport families.”
- “If you looking for drivers, I'm available! Love to apply for employment.”

Discounted rides-on-demand were one of the more popular options. While CMO funding could be applied to discounted trips on services like Lyft and Uber, this would have required all trips to be taken on zero-emission vehicles. Staff saw no practical way to guarantee this, however the subset of P2P households that elect to spend their credit on monthly transit passes will receive a 10% discount through the program for the first two years.

Note: 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

17. When were the needs assessment activities described above completed?

Surveys were distributed door-to-door in English and Spanish between April 1st and 5th and collected over the next 30 days. Focus group/interviews were scheduled on a rolling basis and conducted over May.

Note: Needs assessments must have been completed within the past four years. However, to use the needs assessment expenses as part of the applicant’s Community Resource Contribution, it must have been completed within the past year.

18. Attach the Summary Report of your community transportation needs assessment. Write in “attached” in the box along with any comments.
Attached (see ‘CTNA Summary’) is the Community Transportation Needs Assessment survey questions, aggregated resident survey data, anonymized focus group notes highlights and data tables from the four sources used for the Transportation Data Analysis.

Note: 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).

PROJECT AREA PROFILE
This section collects information about physical boundaries of the project in relation to the requirement that project benefit disadvantage and low-income communities as defined. The project area is the geographic area where end-users reside, where services are based, and where infrastructure to be installed (it does not correspond to destinations or routes). Up to 20 percent of voucher-funded infrastructure and services may be located outside the project area, with documentation of supportive community input reflecting community-identified needs.

19. Which of the following geographies is your Project Area located within?

<table>
<thead>
<tr>
<th>(select at least one and all that apply)</th>
</tr>
</thead>
<tbody>
<tr>
<td>☒ SB 535 Disadvantaged Communities: Census tracts in the top 25 percent of CalEnviroScreen 3.0 scores.</td>
</tr>
<tr>
<td>☒ Affordable housing facility consistent with the CMO requirements.</td>
</tr>
<tr>
<td>☐ Tribal lands within AB 1550-designated low-income communities or SB 535 Disadvantaged Communities. For the purposes of this criterion, “tribal lands” includes any property owned by a California Native American tribal authority and is not limited to federally recognized reservations.</td>
</tr>
</tbody>
</table>

Note: For the purposes of CMO Voucher Pilot Program, the affordable housing facility must meet the following criteria:

a. The property must have at least five units.

b. The property must be deed-restricted low-income residential housing, where at least 80 percent of property residents have incomes at or below 60 percent of the area median income.

Conditional (19a-d):

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

The corner of 20th Street and Alonzo Circle (2020 West Alonzo Circle, Metson, CA)
b. If your project area is within an affordable housing facility, please explain how each property meets the affordability requirements including, (1) list the total number and breakdown of deed-restricted units; and (2) list the affordability/income mix of each property and how it meets the requirement of at least 80 percent of property residents with incomes at or below 60 percent of the area median income. 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. Properties with fewer than 10 years remaining that are willing to extend affordability requirements for a total of 10 years must provide proof of completed extension of affordability restrictions from a state or local agency. Write in “attached” in the box along with any comments.

Attached (see Appendix 2 of ‘Community Housing Partners 2019 annual report). Of the 500 units at Oak Point, 96% (480 of 500) are restricted to low-income individuals with incomes of 60% of Area Median Income. This deed restriction is valid for 25 Years and expires in 2040.

c. 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.

(write in)

d. If your project area eligibility is based on location in the CalEnviroScreen 3.0 Disadvantaged Community, please identify the census tract and ranking score in CalEnviroScreen 3.0.

Census tract: 06602900001, CalEnviroScreen 3.0 score above the 85th percentile.

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, (c) describe the boundaries using street names and cross streets.

At the corner of 20th Street and Alonzo Circle; 2020 West Alonzo Circle, Metson, CA.

21. What is the population size of the project area? Please include your source.
According to the latest 5-year population data, (table s0101) there are 3,999 people in tract 06602900001. According to Community Housing Solutions, there are 900 people living at the multi-family housing facility that P2P will be based out of.

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

(Yes/No)

☐ Yes
☒ No

Note: If the answer is yes, you may submit up to three applications. Multiple project proposals are allowed only for cases where a lead applicant is applying for projects that are located entirely in unincorporated County jurisdictions and therefore are not represented by city governments. If the answer is no, you may only submit one application in the course of each application submission window.

Conditional (22a-b):

a. 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?

(write in)

b. Please indicate the location(s).

(write in)

PROPOSED BUDGET AND PLAN FOR FINANCIAL SUSTAINABILITY

This section in addition to Attachment 1 collects information about the proposed budget and your plan for financial sustainability. Projects must operate for at least 4 years from the date that operations fully launch (when participants start using the service). This period is referred to as the Project Operation Period. In this section, applicants must describe strategies for maintaining the proposed services at least throughout the project operations period in the required Financial Sustainability Plan in their application.

23. Please indicate the total voucher amount you are requesting in this application.

$704,982
24. Please indicate your project type, according to the criteria in Section E.4 of the Implementation Manual (select one):

<table>
<thead>
<tr>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>☒ New service (maximum award of $1,000,000)</td>
</tr>
<tr>
<td>☐ Existing service (maximum award of $600,000)</td>
</tr>
<tr>
<td>☐ Combination of New Service and Existing Service (maximum award of $1,000,000)</td>
</tr>
</tbody>
</table>

Note: New Service is defined as a mobility service that is not currently operating in any location within the proposed project area. Existing Service is defined as a mobility service that is currently operating in some locations of or the entire proposed project area. See Section E.4 of the CMO Implementation Manual for project examples.

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. Write in “attached” along with any comments.

Attached (‘Mobility Project Voucher Budget Worksheet’). Some of the key capital expenses of the project include:

- Rooftop solar array and supporting equipment
  - 360-watt panels (22) and installation at $4.34 per watt

- Networked 50 kW DC fast charger, single pedestal
  - $28,401 for charging hardware through PowerGrid Plus
  - $45,506 for installation with labor, materials, permits and taxes included

- Roadster 2020 electric bikes with built-in cargo storage and lock
  - $1,650 per bike (30), $300 per extra battery (30), shipping/warranty included

- Cero dual-unit secure bike lockers, customized for radio-frequency identification (RFID) access with mobile phones or key-cards
  - $1,500 per bike locker (15), shipping/warranty included

- Construction of caging around bicycle ‘lending hub,’ plus installation of secure bike lockers and tune-up station
  - $9,100

Note: Voucher funding may include Vehicles, Charging and Fueling Equipment, Bicycle/scooter infrastructure, Outreach and Marketing Cost, Planning/Capital/Operations/Voucher Administration Costs, and Additional Transportation Enhancements.

26. Describe your strategies for maintaining the proposed service(s) for a minimum of 4-year project operation period.
Voucher funding will support planning and construction during the first year, as well as staffing and operational expenses for the first and second years of operation. By this time, we believe that P2P will have established an effective operational model.

While pricing will be established in consultation with prospective P2P users, we propose that electric bicycle rentals cost $12 ‘transportation wallet’ credits per day; at this price we expect an average of 12 bikes to be used per day. We’re proposing that each shuttle ride cost $2.50 in ‘transportation wallet’ credits; at this level we expect 48 trips per day. On a monthly basis, that would bring in at least $7,200 assuming no credits go unused, which is unlikely regardless of how credit tiers are determined.

P2P will pursue several secondary revenue sources. The first is private sponsorship of the shuttle. The second will be revenue from any on-site parking spaces that are opened up as a result of the program; Oak Point is a ‘transit-oriented development’ project located less than a mile from Metson’s commuter rail service and within a parking overlay district that charges for street parking. Oak Point charges $250 per month per space in its garage, which is only slightly more than the street parking.

Additionally, CleanTech Incubator and Dashboard Solutions will examine opportunities for additional public and philanthropic funding. Exact partners have not been selected, however, Community Housing Solutions has had a track record of success with the Low-Income Housing Tax Credit and for the past seven years has received operating support from the Neighbor Foundation for its various adult and after-school learning programs.

Note: This response must explain the relationship between voucher funding that, by definition, will support the project for up to 3 years (i.e. up to 1 year of project planning and 2 years of full operations), and the resources required to fully operate the project for at least 4 years (as outlined in the Mobility Project Voucher Budget Worksheet) consistent with the financial sustainability requirement.

27. Describe your strategies for ensuring vehicles and equipment continue to serve the community if operation discontinues after the 4 year voucher agreement term.

If Primed-to-Prosp isn’t financially sustainable and must be discontinued after voucher funding expires, CleanTech Incubator and Community Housing Partners will work with the Community Advisory Panel to solicit feedback for alternative uses of the shuttle (assuming this is after the second-year lease extension has been signed) and any other relevant hardware paid for through the Clean Mobility Options program.
By the end of the voucher funding period, the Community Housing Partners-owned electric bikes used in Primed-to-Prosper bikes would be at the end of what IRS depreciation guidelines suggest is their “useful life,” about two years after purchase. By contrast, this is estimated to be about 10 years from the date of installation for vehicle charging equipment. If the bikes are in safe and working condition, the present idea is for Community Housing Partners distribute them to other CHP properties in program-eligible Disadvantaged Communities for use as free or low-cost rentals. Whether or not this moves forward, the on-site DC fast charger could be opened for use by Oak Point tenants and the general public or applied to some other electric shared mobility service.

COMMUNITY RESOURCE CONTRIBUTION

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.

1. Project-related labor costs associated with this application and the Community Transportation Needs Assessment that formed the basis the proposal; approximately 600 hours were dedicated between Cleantech Incubator, Community Housing Solutions and Dashboard Solutions.

2. An Americorps fellow currently placed at CleanTech Incubator contributed to survey design and translation of the Community Transportation Needs Assessment. CTI has taken steps to bring on another fellow to assist with the first year of planning. Fellows work 1,700 hours over one year; approximately 50% of their time would be dedicated to Primed-to-Prosper, or about 850 hours.

3. Community Housing Solutions will oversee recruitment of Recruitment Transportation Coordinators and their staff at Oak Point will continue to contribute time to the project and cover any expenses related to driver training (estimated direct costs of about $500 per trainee).

4. The indoor resident parking lot at Oak Point will be donated by Community Housing Solutions used for the bicycle ‘lending library’ while the shuttle will be parked and charged in the outdoor staff lot. Neither parking facility is open to the public outside of Oak Point.

5. PowerGrid Plus will host several educational sessions (approximately 120 hours between several staff) for residents of Oak Point and P2P participants about the basics of electric vehicle and bike charging, as well as energy management in general.
Note: For a complete list of eligible community resource contributions, please refer to Table 3, Section J.7 in the CMO Implementation Manual.

29. Attach at least one supporting document for each of the five Community Resource Contributions proposed in your previous response. Write in “attached” along with any comments.

Letter of commitment from Community Housing Solutions is attached (along with those of other sub-applicants and local stakeholders).

COMMUNITY OUTREACH PLAN
This section collects information about the applicant’s plans to engage with the community and promote the service throughout operations.

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.
Before the launch of the P2P service, **Community Housing Solutions** will engage the residents at Oak Point through a series of activities. Once launched, the community engagement plan features a variety of strategies to engage as many community members as possible during project operations. During operations, routine check-ins conducted with participants will occur in conjunction with shuttle services. Community Housing Solutions will also employ socially distanced options for all community engagement.

**Key Partners and Experience:** Community Housing Solutions will lead community engagement efforts. The organization started over 25 years ago to provide more affordable housing to low-income farmworkers and their families in the Central Valley. CHP has a history of providing community resources to its tenants, including financial training and after-school programs. Key activities included:

1) **Prior to Project Execution**
   a. CHP assisted in the translation of the Community Transportation Needs Assessment survey: a paper survey delivered to all units at Oak Point. Survey responses were then processed, and follow-ups occurred on a virtual one-on-one and small-group interviews.
   b. We intend to repeat that process in the first nine months of project selection to refine the project design and maintain community input in the development process.

2) **4-5 months After Project Approval and Voucher Execution**
   a. Community engagement will feature the identification of preferences around
      i. critical terms and conditions such as subscription tiers and pricing,
      ii. the trip scheduling and reservation process, and
      iii. how the service is branded in the broader community outside of Oak Point (see Milestone 4).
   b. Hired from within Oak Point (or the surrounding community), Resident Transportation Coordinators will assist the above process along with the **Community Advisory Panel (CAP)** of local stakeholders (see Milestone 5).
3) **6 months After Project Approval and Voucher Execution**
   a. The Resident Transportation Coordinators will begin work on developing ‘transportation toolkit’ materials that raise awareness about P2P and help orient members (see Milestone 9).

4) **Throughout Operations**
   a. Resident Transportation Coordinators will operate the shuttle service. They will follow up individually with participants to complete the necessary on-boarding and check-in surveys.

**Community Engagement During COVID-19:** Given the detrimental effects of the current health crisis on in-person activities, and the intent to engage residents not reached during the initial round of the process, CHP will employ a varied strategy to continue to engage with community members during this difficult time.

As the first stage of our community engagement consisted of the delivery of paper surveys, we will continue to follow this process. Paper surveys will be delivered to all residents, and follow-ups will occur through virtual or telephone-based one-on-one interviews and small group interviews. We intended for the CAP to meet quarterly either at the Metson City Hall or the community room at Oak Point. We will survey our members and decide on the preferred course of action. We will plan on still meeting in-person, requiring and supplying appropriate personal protective equipment (PPE), and maintaining social distancing for indoor conditions with a virtual and conference line options for those who opt-out of the in-person meeting. If the weather allows, we will also organize outdoor meetings at Oak Point.

**General Strategy for Conducting Marketing and Outreach after Launch**

Given the first stage of community engagement consisted of paper surveys delivered to the community, we do not heavily rely on online technologies. To engage and market the service, we will deliver paper-based mailers to inform residents of the new services available to them. We also hold a series of outdoor events to introduce residents to the services. Bicycles will be available to test drive, wiped down after every ride with sanitizing liquids. Shuttle Rides will be limited to 2 - 3 people, preferably family members, to ensure social distancing. All riders in shuttles will be required to wear masks. Social distancing can be maintained, and PPE supplied for those who cannot access it themselves.

We have also organized a telephone hotline for residents to call in with concerns or to give verbal feedback or receive more information regarding the services with no in-person contact. A Resident Transportation Coordinators will staff the hotline and be available to answer questions.
31. Describe how you will engage with other community stakeholders affected by the project.

As noted above, within the first quarter of project approval/execution, Dashboard Solutions will work with Community Housing Solutions to help establish the Community Advisory Panel. The CAP will aim to meet in person (at City Hall) or online (via Zoom or similar provider) on a monthly basis to assist with initial program design and recruitment of the Resident Transportation Coordinators. This hire, along with CHP and the CAP, will help reach performance metrics for the outreach and education program, based on customer satisfaction, use of alternative transportation options, and behavior change.

P2P is focused on a residential community mostly at 60 percent or below the county median income, so in the spirit P2P will try to contract (and fairly compensate) local vendors for equipment installation, maintenance and repairs.

Note: The following should be considered and discussed in the response: local businesses, residents, or other stakeholders who may be affected by new construction or other aspects of the project. Please discuss specific events, materials, audiences, and approaches. See Section J.8 of the CMO Implementation Manual for details.

ATTESTATIONS AND SIGNATURE

1. I, the authorized officer to represent and sign this application on behalf of my organization/tribe as the Lead Applicant, have read, understand and agree to abide by all of the requirements, terms and conditions in the CMO Implementation Manual;

2. I attest to all of the following:

   a. Our organization/tribe is not an existing CARB Clean Mobility Options grantee or sub-grantee and requesting funding for expanding the same type of project in the same project area;

   b. Our team includes at least one team member with the minimum one year of experience operating mobility services or we commit to select a mobility service provider from the Directory or an entity who meets the minimum qualification criteria within 3 months from the voucher agreement execution date;

   c. If we are applying for voucher funding for infrastructure:

      i. We understand and agree to comply with CEQA requirements set forth in the CMO Program Implementation Manual;
ii. We understand the required permits and necessary permissions to operate the project service(s);

iii. The infrastructure will be used primarily to support the service of our core project model;

d. If we are using a TNC for the core project model, services will always operate by zero-emission vehicles;

e. Our team complies with all applicable State and/or federal conflict of interest laws; and

f. All information provided in this application and any attachments are true and correct.

Signed by the authorized officer:

<table>
<thead>
<tr>
<th>Name:</th>
<th>Signature:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Juan Doe</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Title:</th>
<th>Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Officer</td>
<td>October 10, 2020</td>
</tr>
</tbody>
</table>

Applications may be submitted by email at application@cleanmobilityoptions.org, or by mail to the following address:

PLEASE RETURN SIGNED DOCUMENTS TO:

Attention: Clean Mobility Options

CALSTART

48 South Chester Avenue
Pasadena, CA 91106

www.cleanmobilityoptions.org
ATTACHMENT 1

MOBILITY PROJECT VOUCHER
SAMPLE BUDGET WORKSHEET

FOR THE
MOBILITY PROJECT VOUCHER APPLICATION

CLEAN MOBILITY VOUCHER PILOT PROGRAM
ATTACHMENT 1. MOBILITY PROJECT VOUCHER BUDGET WORKSHEET

This attachment includes a budget worksheet that is required to be submitted with applications to Mobility Project funding for the Clean Mobility Options Voucher Pilot Program in 2020. Applicants requesting funding for Mobility Projects must complete all required fields in the worksheet and submit it with their application.

This worksheet has three sections:

Section 1. Project Components (columns a and b): Describes given expense categories as defined in the Implementation Manual (column a) followed by specific items needed for individual projects (column b). Applicants should list all items in the “item description” column (column b) that require funding to launch and operate the project during both the Voucher Funding Term (i.e. up to one year of launch and two years of operations) and for the two additional years of operations after the Voucher Funding Term ends. Applicants may add or delete rows as necessary.

Section 2. Voucher Budget (columns c through h): Describes the quantitative voucher request (columns c through e) and provides an annual breakdown of that request for each of the 3 years of the Voucher Funding Term (columns f through h). When describing the voucher request, the applicant must specify a unit that the cost will be based on (e.g. per hour, month, etc.) in column d, specify the number of units that will be needed for the entire Voucher Funding Term, and multiply those figures to determine the total voucher amount by item in column e. Applicants may use their discretion to determine what units and number are most appropriate. Please note that the total voucher amount by item column (e) does not automatically sum, so applicants must calculate this input manually.

Applicants must summarize all the costs indicated in column e in the “Grand Total - Voucher Funding Term (Voucher Funds)” row. If approved, this will become the total voucher amount. If the applicant uses an auto-sum feature to calculate the total amount, it is the applicant’s responsibility to ensure that the calculation is accurate. Applicants may provide any explanatory notes in the notes section.

Section 3. Other Funds Budget (columns i and j): Describes the funding needed to operate the project during years 3-4 of operations by year. Funding in this period corresponds to expenses that are expected to be incurred and will be covered by funds other than the voucher. This section is used as a basis to develop the applicant’s plans for financial sustainability which the applicant must discuss in the body of the application. There are no minimum costs for this period, but the applicant must provide a true and accurate representation of the costs that are
expected to be incurred to continue to effectively operate the service for the remainder of the Voucher Agreement Term. Applicants must summarize columns i and j in the “Grand Total – Other Funds Budget (Non-CMO Funds)” row.

**Instructions:**

1. Complete the table by entering data in blue cells. Do not enter data in grey or white cells.
2. Add or delete rows as necessary.
3. Manually ensure that all subtotals and calculations are correct. The entire sheet is "unlocked" and it is the applicant's responsibility to ensure accuracy.

**Cost Minimums and Maximums:**

Applicants must ensure that voucher individual amounts and category totals comply with allowable voucher amounts in the Implementation Manual (see Section F in the CMO Implementation Manual). Applicants may use the “Category Eligibility Check Worksheet” to ensure that they meet eligibility requirements for categories that have minimum and maximum requirements. Please note in particular the following requirements by category:

- **Outreach and Marketing Costs**: Minimum of $25,000 or 10% of total voucher amount, whichever is more; maximum of 30% of total voucher amount.
- **Voucher Administration Costs**: Maximum 15% of total voucher amount.
- **Bicycle/Scooter Infrastructure and Installation**: Maximum of 300% of amount of electric bicycle/scooter vehicles or 200% of amount of non-electric bicycle/scooter vehicles amount.
- **Additional Transportation Enhancements**: Maximum of 10% of total voucher amount.

Applications with budgets that do not conform to eligibility requirements will be deemed ineligible.

**Additional Information:**

All costs will be reimbursed on a reimbursement basis only (e.g. after an approved cost has been incurred and properly documented) in accordance with requirements for allowable use of funds and voucher and payment processing. For labor hours, costs listed must be for cost recovery only (e.g. no profit). The Program Administrator may request clarification, additional detail, and/or a financial audit prior to and after the prospective funding award. Applications will not be processed unless these worksheets are fully completed and included in the application. **Technical Assistance is available to help applicants complete the worksheet. Please see [www.cleanmobilityoptions.org](http://www.cleanmobilityoptions.org) for contact information.**
## Mobility Project Voucher Budget Worksheet

Instructions: Enter data in blue cells. Do not enter data in grey or white cells. Add rows as necessary. The entire sheet is "unlocked" and it is the applicant's responsibility to ensure that subtotals and calculations are accurate. Voucher amounts and category totals must comply with allowable voucher amounts in the Implementation Manual. It is recommended that applicants additionally complete the optional "Category Eligibility Check Worksheet" in the table below to ensure that they meet eligibility requirements for categories that have minimum and maximum requirements.

### Section 1. Project Components

<table>
<thead>
<tr>
<th>Expense Category</th>
<th>Item description</th>
<th>(c) Voucher amount requested per unit or hour ($)</th>
<th>(d) Number of units or hours requested</th>
<th>(e) Total voucher amount by item ($)</th>
<th>(f) Project Launch (Up to 1 Year) ($)</th>
<th>(g) Year 1 of Operations ($)</th>
<th>(h) Year 2 of Operations ($)</th>
<th>(i) Year 3 of Operations ($)</th>
<th>(j) Year 4 of Operations ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motor Vehicles and Associated Hardware</td>
<td>Ford E-450 shuttle down payment</td>
<td>$23,100</td>
<td>1</td>
<td>$23,100</td>
<td>$23,100</td>
<td>n/a</td>
<td>n/a</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Bicycles and Scooters</td>
<td>2020 Roadster e-bikes w/locks</td>
<td>$1,650</td>
<td>30</td>
<td>$49,500</td>
<td>$49,500</td>
<td>n/a</td>
<td>n/a</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td>Roadster child bike seats</td>
<td>$229</td>
<td>5</td>
<td>$1,145</td>
<td>$1,145</td>
<td>n/a</td>
<td>n/a</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Charging/Fueling Equipment and Installation</td>
<td>Solar array w/equipment and installation</td>
<td>$4.33</td>
<td>7920</td>
<td>$34,294</td>
<td>$34,294</td>
<td>n/a</td>
<td>n/a</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td>50 kw DC fast charger</td>
<td>$73,907</td>
<td>1</td>
<td>$73,907</td>
<td>$73,907</td>
<td>n/a</td>
<td>n/a</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Bicycle/Scooter Infrastructure and Construction</td>
<td>Lending Hub construction</td>
<td>$9,100</td>
<td>1</td>
<td>$9,100</td>
<td>$9,100</td>
<td>n/a</td>
<td>n/a</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Installation (Maximum 300% of amount of electric bicycle/scooter or 200% of non-electric bicycles/scooter amount)</td>
<td>Customized Cero dual-unit bike lockers</td>
<td>$1,500</td>
<td>15</td>
<td>$22,500</td>
<td>$22,500</td>
<td>n/a</td>
<td>n/a</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Planning Costs</td>
<td>CTI Executive Director</td>
<td>$75</td>
<td>200</td>
<td>$15,000</td>
<td>$15,000</td>
<td>n/a</td>
<td>n/a</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td>CTI Research Manager</td>
<td>$50</td>
<td>300</td>
<td>$15,000</td>
<td>$15,000</td>
<td>n/a</td>
<td>n/a</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td>CHP Partnership Director</td>
<td>$70</td>
<td>200</td>
<td>$14,000</td>
<td>$14,000</td>
<td>n/a</td>
<td>n/a</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td>DC Project Lead</td>
<td>$60</td>
<td>200</td>
<td>$12,000</td>
<td>$12,000</td>
<td>n/a</td>
<td>n/a</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Outreach and Marketing Costs (Minimum $25,000 or 10% of total voucher, whichever is more; maximum of 30% of total voucher)</td>
<td>CTI Research Manager</td>
<td>$50</td>
<td>300</td>
<td>$15,000</td>
<td>$5,000</td>
<td>$5,000</td>
<td>$5,000</td>
<td>$5,000</td>
<td>$5,000</td>
</tr>
<tr>
<td></td>
<td>CHP Partnership Director</td>
<td>$70</td>
<td>300</td>
<td>$21,000</td>
<td>$7,000</td>
<td>$7,000</td>
<td>$7,000</td>
<td>$3,500</td>
<td>$3,500</td>
</tr>
<tr>
<td></td>
<td>DS Project Lead</td>
<td>$60</td>
<td>200</td>
<td>$12,000</td>
<td>$4,000</td>
<td>$4,000</td>
<td>$4,000</td>
<td>$2,000</td>
<td>$2,000</td>
</tr>
<tr>
<td></td>
<td>CHP/Oak Point Building Supervisor Resident Transportation Coordinator/Driver 1</td>
<td>$35</td>
<td>300</td>
<td>$10,500</td>
<td>$10,500</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td>Resident Transportation Coordinator/Driver 2</td>
<td>$25</td>
<td>200</td>
<td>$5,000</td>
<td>$5,000</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td>P2P program design</td>
<td>$20</td>
<td>300</td>
<td>$6,000</td>
<td>$2,000</td>
<td>$2,000</td>
<td>$2,000</td>
<td>$2,000</td>
<td>$2,000</td>
</tr>
<tr>
<td>Operations and Maintenance Costs</td>
<td>participation gift cards</td>
<td>Community Advisory Panel participation gift cards</td>
<td>Resident Transportation Coordinator/Driver 1</td>
<td>Resident Transportation Coordinator/Driver 2</td>
<td>CHP/Oak Point Building Supervisor</td>
<td>Ford E-450 monthly lease</td>
<td>Dashboard Solutions monthly subscription</td>
<td>Annual commercial liability insurance (shuttle, bikes)</td>
<td>Electricity for shuttle (kWh)</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>--------------------------</td>
<td>--------------------------------------------------</td>
<td>---------------------------------------------</td>
<td>---------------------------------------------</td>
<td>-----------------------------------</td>
<td>-------------------------</td>
<td>------------------------------------------</td>
<td>-----------------------------------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>$30</td>
<td>360</td>
<td>$10,800</td>
<td>$3,600</td>
<td>$3,600</td>
<td>$3,600</td>
<td>$3,600</td>
<td>$3,600</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$25</td>
<td>2600</td>
<td>$65,000</td>
<td>$0</td>
<td>$32,500</td>
<td>$32,500</td>
<td>$32,500</td>
<td>$32,500</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$35</td>
<td>1200</td>
<td>$42,000</td>
<td>$0</td>
<td>$21,000</td>
<td>$21,000</td>
<td>$21,000</td>
<td>$21,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$825</td>
<td>50</td>
<td>$41,250</td>
<td>$1,650</td>
<td>$19,800</td>
<td>$19,800</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$975</td>
<td>50</td>
<td>$48,750</td>
<td>$1,950</td>
<td>$23,400</td>
<td>$23,400</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$5,000</td>
<td>2.2</td>
<td>$11,000</td>
<td>$1,000</td>
<td>$5,000</td>
<td>$5,000</td>
<td>$5,000</td>
<td>$5,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$0.157</td>
<td>48,000</td>
<td>$7,536</td>
<td>$314</td>
<td>$3,611</td>
<td>$3,611</td>
<td>$3,611</td>
<td>$3,611</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$300</td>
<td>30</td>
<td>$9,000</td>
<td>$9,000</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>
### Voucher Administration Costs (Maximum 15% of total voucher)

<table>
<thead>
<tr>
<th>Position</th>
<th>Category Total</th>
<th>Applicable Denominator</th>
<th>Percentage</th>
<th>Conforms to Eligibility Requirement?</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTI Research Manager</td>
<td>$6,000</td>
<td>$3,000</td>
<td>20%</td>
<td>No</td>
</tr>
<tr>
<td>CHP Partnership Director</td>
<td>$10,500</td>
<td>$3,500</td>
<td>34%</td>
<td>No</td>
</tr>
<tr>
<td>CHP/Oak Point Building Supervisor</td>
<td>$2,100</td>
<td>$700</td>
<td>30%</td>
<td>No</td>
</tr>
<tr>
<td>P2P monthly transit pass 10% subsidy</td>
<td>$36,000</td>
<td>$18,000</td>
<td>50%</td>
<td>Yes. $18,000 and between 10% and 30% of total voucher request.</td>
</tr>
</tbody>
</table>

### Additional Transportation Enhancements (Maximum 10% of total voucher)

<table>
<thead>
<tr>
<th>Position</th>
<th>Category Total</th>
<th>Applicable Denominator</th>
<th>Percentage</th>
<th>Conforms to Eligibility Requirement?</th>
</tr>
</thead>
<tbody>
<tr>
<td>DS Web Developer for accessibility features</td>
<td>$6,000</td>
<td>$0</td>
<td>0%</td>
<td>Yes. Less than 15% of total voucher request.</td>
</tr>
</tbody>
</table>

### Grand Total

<table>
<thead>
<tr>
<th>Description</th>
<th>Category Total</th>
<th>Applicable Denominator</th>
<th>Percentage</th>
<th>Conforms to Eligibility Requirement?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grand Total - Voucher Funding Term (Voucher Funds)</td>
<td>n/a</td>
<td>$704,982</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grand Total - Other Funds Budget (Non-CMO Funds)</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Optional: Category Eligibility Check Worksheet

Instructions: Calculate sums in "Category Total" and "Applicable Denominator" Columns. User may need to adjust example formula if additional rows were manually inserted above.

<table>
<thead>
<tr>
<th>Cost Category</th>
<th>Eligibility Requirement Summary (See Implementation Manual for Details)</th>
<th>Category Total</th>
<th>Applicable Denominator</th>
<th>Percentage</th>
<th>Conforms to Eligibility Requirement?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outreach and Marketing Costs</td>
<td>Minimum $25,000 or 10% of total voucher, whichever is more; maximum of 30% of total voucher</td>
<td>$85,300</td>
<td>$704,982</td>
<td>12.1%</td>
<td>Yes. More than $25,000 and between 10% and 30% of total voucher request.</td>
</tr>
<tr>
<td>Voucher Administration Costs</td>
<td>Maximum of 15% of total voucher amount</td>
<td>$18,600</td>
<td>$704,982</td>
<td>2.6%</td>
<td>Yes. Less than 15% of total voucher request.</td>
</tr>
<tr>
<td>Bicycle/Scooter Infrastructure and Installation</td>
<td>Maximum of 300% of amount of electric bicycle/scooter vehicles or 200% of amount of non-electric bicycle/scooter vehicles amount</td>
<td>$31,600</td>
<td>$50,645</td>
<td>62.4%</td>
<td>Yes. Less than 300% of requested voucher funds for electric bikes/scooters.</td>
</tr>
<tr>
<td>Additional Transportation Enhancements</td>
<td>Maximum of 10% of total voucher amount</td>
<td>$42,000</td>
<td>$704,982</td>
<td>6.0%</td>
<td>Yes. Less than 10% of total voucher request (nothing in this category requested)</td>
</tr>
</tbody>
</table>

Notes:
ATTACHMENT 2

SAMPLE INFRASTRUCTURE SITE AND NEEDS PROFILE WORKSHEET

FOR THE MOBILITY PROJECT VOUCHER APPLICATION

CLEAN MOBILITY VOUCHER PILOT PROGRAM
ATTACHMENT 2. Infrastructure Site and Needs Profile Worksheet

This worksheet is a required supplement for applications to Mobility Project funding with the Clean Mobility Options Voucher Pilot Program in 2020. Applicants requesting funding for any of the following categories of infrastructure must complete this worksheet and submit with their application.

- Level 2 or DC Fast Charger EVSE
- Bicycle and Scooter infrastructure
- Solar Photovoltaic Equipment
- Hydrogen Fueling Infrastructure

Applications that do not include funding requests for specified infrastructure should not submit this worksheet.

Instructions: First, complete Section I. Overview, then complete those subsections of Section II. Infrastructure Site and Needs Profile by Category that are relevant to your project proposal and only for categories that correspond to the funding application. You may optionally remove subsections in Section 2 that correspond to irrelevant categories.

Additional Information: All applicants requesting funding for specified infrastructure must fully complete all applicable sections in the worksheet below according to the instructions provided. Applications may not be processed unless this worksheet is fully completed and included in the application. Equipment or approaches that do not meet eligibility criteria will not be approved.

Technical Assistance is available to help applicants complete this worksheet. Please visit www.cleanmobilityoptions.org for contact information.

Section I. Overview

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

   CleanTech Incubator supporting Primed-to-Prosper, bringing the mobility-as-a-service model to affordable housing.

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

   ☒ Electric Vehicle Supply Equipment (EVSE)
     ☐ Level 2
     ☒ DC Fast Charger
   ☒ Bicycle and Scooter infrastructure
   ☒ Solar Photovoltaic Equipment
   ☐ Hydrogen Fueling Infrastructure
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.

Within the first quarter of project approval/execution, PowerGrid Plus will engage with the relevant regulatory and permitting agencies for installation of the DC fast charger and rooftop solar panels.

There was considerable thought given to whether AC Level 2 or DC fast charging would be appropriate for Primed to Prosper. Level 2 charging would be less expensive and overnight charging would mostly overlap with off-peak electricity rates, which often fall at night. But DC fast charging became more attractive—and necessary—with Primed to Prosper’s expansion goals. Increasing ridership while maximizing service flexibility likely would mean that P2P’s single vehicle would not be able to complete a day’s job on a single overnight charge—DC fast charging guarantees that the shuttle will be able to run continuously throughout the day without interruption while Level 2 charging would take up to 10 hours for a full charge.

Once the necessary permitting is approved, PowerGrid Plus will begin installation of the 50 kW DC fast charger (EVPlugX network) in Oak Point’s small exterior parking lot. Crews will begin installation of the 8-kilowatt (kW) photovoltaic solar array on Oak Point’s rooftop, along with the inverter, and any wiring to the corner of Oak Point’s indoor parking garage where the ‘lending hub’ will be located. The ‘lending hub’ will consist of a bike cage for residents to store personal bikes (currently only several outdoor racks are available) and a tune-up station. Inside the bike cage will be RFID-enabled storage lockers for the bikeshare units. Installation of the lending hub will be led by PowerGrid Plus and will be the last step in the construction process.

While this unique service model will require a degree of ‘learning on the fly’ from the team, installing all equipment within the Oak Point grounds streamlines the number of partners involved and will greatly reduce the chance for planning and construction delays.

Section II. Infrastructure Site and Needs Profile by Category

Electric Vehicle Supply Equipment (EVSE) – Level 2 or DC Fast Charger:

1. Please check all of the following types of EVSE technology that you request funding for:

   (select all that apply)
   - ☐ Level 2 Chargers
   - ☒ DC Fast Chargers

3
Note: Please see Section H in the CMO Implementation Manual for charging equipment minimum eligibility requirements. Proposals that include ineligible equipment or approaches will not be approved.

Conditional (1a):

a. If your application seeks funding for DC Fast Chargers, please provide a list of DC fast charger site(s), addresses, and an explanation of site control (attach documentation, such as appropriate agreement or contract with a site owner, public right of way approval, and other supporting documents as relevant).

The DC fast charger is proposed outside of Oak Point in its staff parking lot. Community Housing Partners owns the property and has committed to hosting the equipment, as described in the attached letter of commitment.

Note: If you seek funding for DC Fast Chargers 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.

2. Please provide a description of your planned infrastructure to be installed at all proposed sites, with addresses or approximate locations for each installation.

One single pedestal Direct Current Fast Charge (DCFC) charging unit. Manufactured by EVPlugX, 50 kW charging capacity with both CHAdeMO and SAE CCS connector options. Will be networked for payment systems, data management, and reporting on the PowerGrid Plus’s platform, and maintained through a five-year contract with PowerGrid Plus. The staff parking lot is at Oak Point’s main address, 2020 West Alonzo Circle, Metson, CA.

3. Have you identified target locations for all infrastructure that is part of the project?

(select one)

☒ Yes
☐ No

Note: Applicants may optionally wait to determine the exact site of the following types of infrastructure until the voucher is signed: Level 2 EVSE, Bicycle and Scooter Infrastructure, and
Solar Photovoltaic Equipment. However, the location of DC fast chargers and Hydrogen Fueling Infrastructure must be determined by the time of and indicated in the application.

4. Please check all the following that apply to your EVSE installation.

|☐ | Installation depends on authorization to use public right of way that has not yet been granted |
|☒ | Installation requires a new service drop, undergrounding, or new utility interconnection |
|☐ | Installation is in a county that is not EVCS Permit Ready or where permit streamlining is in progress in support of AB-1236 compliance (see map from GoBiz at http://www.business.ca.gov/ZEVReadiness) |

Conditional (4a):

a. If any boxes are checked on the previous question, please explain how the project will move forward in the event that authorizations, services, and/or permits are not secured in enough time to allow for a timely project launch.

In the event that for some reason installation of a DC fast charger isn’t possible, then the project will utilize a Level 2 charger and pursue arrangements to use the two DC fast chargers near or within Metson.

Note: If any of the boxes are checked, you must provide a contingency plan as an attachment to the application (per Section J-9-d of the CMO Implementation Manual) that would allow operations to proceed with an alternative method. Examples of alternatives include:

- Construction of Level 2 charger under conditions that support a relatively fast installation time, such as (1) Site and right-of-way are owned/controlled by lead applicant, (2) no service drop, undergrounding, or new utility interconnections needed, (3) Location is in a county that is AB-1236 compliant (fast permitting).
- Agreement with provider of existing public charger network to use underutilized chargers.
- Retail use of existing public charger network, e.g. ChargePoint. Just set up an account (see DOE map).
- Use of portable charging device with existing plug in.
- Use of Level 1 charger (overnight charge) on owned/controlled site; plug in to existing 120 or 240 v outlet and charge immediately with no construction.

5. Are permits required to site any of the infrastructure?
(select one)
☒ Yes
☐ No

Conditional (5a):

a. If yes, indicate the following for all required permits: name of the permit(s), permitting agency, status of permit(s), and summary of plan to obtain permit(s).

In August, Community Housing Partners engaged the Pacific Regional Utility to initiate the DC fast charging installation process. The online application lays out the three general steps:

1. Apply
2. Build
3. Connect

As part of the application, PowerGrid Plus and Community Housing Partners sent the specified pictures of the staff parking lot and calculated the distance from the building electric panels to the proposed parking space. After submitting the application, Pacific Regional Electric Utility sent an assessor document impacts on the grid to determine a cost estimate. Within two weeks, they sent back a report confirming that since the charger is relatively close (within 300 feet of a transformer), that the DC fast charger would require fairly minimal construction work.

The next step in the process will be to build the necessary infrastructure to support the DC fast charger. This includes several steps

- Arranging for trenching
- Preparing for trench inspection
- Completing electrical work
- Scheduling a date for Pacific Regional Utility’s crew to break ground

The connection step involves engaging with the City of Metson. Pursuant to AB 1236, Government Code Section 65850.7, the city maintains an online EV permitting and inspection portal. According to the City’s website, once the team submits the site specifications from Pacific Regional Utility, a certified inspector will come within five business days to verify that the installation complies with California Building Code accessibility regulations and the municipal electrical code. After this site visit, an approval or denial to build will be granted in 15 business days. After this approval, the city will be available to assist PowerGrid Plus (if needed) in submitting a CEQA Notice of Exemption to the California Office of Planning and Research. Once this approval is granted, the team can schedule a date for Pacific Regional
Utility to break ground; the utility’s estimate was that necessary site preparation could be completed within a month of City approval.

Once PowerGrid Plus is finished with installation of the charger (and related amenities) and the meter installed, the City will schedule a final inspection and Pacific Regional Utility will activate electrical service.

6. If the target locations for all infrastructure have been identified, please describe how the requirement for 80 percent of voucher-funded infrastructure or services to be located within the eligible project areas is satisfied.

All EVSE is within the project area and eligible census tracts.

Note: Response may be given in terms chosen by the applicant (e.g., 80 percent of total capital costs, 80 percent of the area in square miles, 80 percent of vehicle parking and/or chargers, etc.) as needed. If you do not know the site location, provide as much information as possible now, and Program Administrator will seek more information prior to voucher fund reimbursements. Also, note that applicants may also modify their project design following award on a case-by-case basis.

7. Have you already filed a Notice of Exemption (NOE) from CEQA for your project?

(select one)

☐ Yes (please attach)  
☒ No, but will file one

Note: A Notice of Exemption (NOE) from CEQA is required for all infrastructure sites. Applicants must provide a NOE prior to redeeming voucher funds. The entity who is responsible to secure the NOE may vary based on site.

Conditional (7a):

a. If you do not have a CEQA NOE for all sites at this time, who are the lead entities that you will likely need to work with to secure them? (Write in or include discussion in separate document).

CleanTech Incubator will work with PowerGrid Plus (and the City of Metson’s Planning and Community Development division, to file a CEQA Notice of Exemption for the following categorical exemptions:

- § 15301 (Class 1) for Existing Facilities
- § 15303 (Class 3) for Small Structures
- § 15304 (Class 4) for Minor Alterations to Land
The project will consist of minor alterations to existing structures and/or mechanical equipment involving negligible or no expansion of use beyond that existing; including replacement or reconstruction of existing utility systems and/or facilities involving negligible or no expansion of capacity and/or minor alterations to land, including minor trenching and backfilling where surface is restored. All power will be provided from the existing electrical panel and the work includes installations of conduit, wiring, electrical connections and mounting equipment. Minor teaching may be required to bring power from local to the proposed chargers.

8. Do you own the property for all of the sites where you propose to install infrastructure and are you fully authorized to install such infrastructure (e.g. free of any agreements or encumbrances that would pose a conflict)?

(select one)
☐ Yes
☒ No

Note: Applications may be approved prior to obtaining all necessary permissions; however, such permissions (or an approved project modification) will be required prior to signing the voucher agreement.

Conditional (8a):

a. If you do not own the property for all of the sites where you propose to install infrastructure and/or need authorization to install such infrastructure, do you have letter(s) of support from the site owner or responsible entity, including relevant public agency in the case of public right-of-way?

(select one)
☒ Yes
☐ No

i. If yes to the question above, please attach letter(s) of support.

(check the box)
☒ Letter of support is attached from Community Housing Partners

ii. Do you require any additional permissions (e.g. Historical Preservation, Above Ground Facilities Ordinance, Americans with Disabilities Act [ADA] accessibility requirements, etc.)?

(select one)
☐ Yes
☒ No
iii. If yes to the previous question, please describe the additional requirements and your plans to achieve them (write in).

(write in)

9. Has any part of the infrastructure already been installed, paid for, or committed to be paid for?

☐ Yes
☒ No

Note: Answering “yes” does not disqualify your application; however, additional documentation may be required after award to demonstrate that no double-billing has occurred or will occur.

Conditional (9a):

a. If any of the infrastructure already been installed, paid for, or committed to be paid for, please describe the existing infrastructure and what costs have been incurred or committed.

PowerGrid Plus, which participated in the scoping of this proposal (and budget), has not been formally retained.

A. Bicycle and Scooter Infrastructure:

1. Please check all of the following types of bicycle or scooter infrastructure that you seek funding for:

Select all that apply:

☒ Electric vehicle supply equipment
☒ Docking, securement, storage, and related infrastructure for parking
☐ Quick-build safety infrastructure in the public right-of-way

Note: Please see Section H in the CMO Implementation Manual for charging equipment minimum eligibility requirements. Proposals that include ineligible equipment or approaches will not be approved.

2. Have you identified target locations for all infrastructure that is part of the project?

(select one)

☒ Yes
☐ No

Note: Applicants may optionally wait to determine the exact site of the following types of infrastructure until the voucher agreement is executed: Level 2 EVSE, Bicycle and Scooter
Infrastructure, and Solar Photovoltaic Equipment. However, the location of DC fast chargers and Hydrogen Fueling Infrastructure must be determined by the time of and indicated in the application.

3. Please provide a description of your planned infrastructure to be installed by site, with addresses or approximate locations for each installation.

<table>
<thead>
<tr>
<th>All equipment will be installed at the Oak Point housing complex:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• RFID-enabled storage lockers for shared electric bikes</td>
</tr>
<tr>
<td>• A bike cage, enclosing the Lending Hub, where Oak Point residents not participating in P2P can store their bikes and use the tune-up station</td>
</tr>
</tbody>
</table>

4. Does installation depend on authorization to use a public right of way that has not yet been granted?

<table>
<thead>
<tr>
<th>(select one)</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Yes</td>
</tr>
<tr>
<td>☒ No</td>
</tr>
</tbody>
</table>

Conditional (4a):

a. If the installation depends on authorization to use a public right of way that has not yet been granted, please explain how the project will move forward in the event that authorizations is not secured in enough time to allow for a timely project launch.

( write in )

5. Are permits required to site any of the infrastructure?

<table>
<thead>
<tr>
<th>(select one)</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Yes</td>
</tr>
<tr>
<td>☒ No</td>
</tr>
</tbody>
</table>

Conditional (5a):

a. If permits are required, indicate the following for all required permits: Name of permit, permitting agency, status of permit, and summary of plan to obtain permit.

( write in )
6. If the target locations for all infrastructure have been identified, please describe how the requirement for 80 percent of voucher-funded infrastructure or services to be located with the eligible project areas is satisfied.

All bike infrastructure will be located in Oak Point’s on-site, resident parking garage and is within the eligible project area.

Note: Response may be given in terms chosen by the applicant (e.g. 80 percent of total capital costs, 80 percent of area by square miles, 80 percent of vehicle parking and/or chargers, 80 percent of ride pickups, etc.) as needed. If you do not know the site location, provide as much information as possible now, and Program Administrator will seek more information prior to voucher fund disbursements. Also, note that applicants may also modify their project design following award on a case-by-case basis.

7. Have you already filed the Notice of Exemption (NOE) from CEQA for your project?

<table>
<thead>
<tr>
<th>(select one)</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Yes (please attach)</td>
</tr>
</tbody>
</table>

Note: A NOE from CEQA is required for all infrastructure sites. Applicants must provide a NOE prior to redeeming voucher funds. The entity who is responsible to secure the NOE may vary based on site.

Conditional (7a):

a. If you do not have a CEQA NOE for all sites, who are the lead entities that you will likely need to work with to secure them? (Write in or include discussion in separate document).

CleanTech Incubator will work with PowerGrid Plus to file a CEQA Notice of Exemption for the following categorical exemptions:
- § 15301 (Class 1) for Existing Facilities

8. Do you own the property for all of the sites where you propose to install infrastructure and are you fully authorized to install such infrastructure (e.g., the site is free of any restrictions, agreements or encumbrances that would pose a conflict)?

<table>
<thead>
<tr>
<th>(select one)</th>
</tr>
</thead>
<tbody>
<tr>
<td>☒ Yes</td>
</tr>
</tbody>
</table>

Note: Applications may be approved prior to obtaining all necessary permissions; however, documentation of proof of authority to install infrastructure on your proposed site(s) (or an approved project modification) will be required prior to signing the voucher agreement.
Conditional (8a):

a. If you do not own the property for all of the sites where you propose to install infrastructure and/or need authorization to install such infrastructure, do you have letter(s) of support from the site owner or responsible entity, including relevant public agency in the case of public right-of-way?

(select one)
☒ Yes
☐ No

i. If yes to the question above, please attach letter(s) of support.

(check the box)
☒ Letter of support is attached from Community Housing Partners

ii. Do you require any additional permission?

(select one)
☐ Yes
☒ No

iii. If yes to the previous question, please describe the additional requirements and your plans to achieve them (write in).

(write in)

9. Has any part of the infrastructure already been installed, paid for, or committed to be paid for?

(select one)
☐ Yes
☒ No

Note: Answering “yes” does not disqualify your application; however, additional documentation may be required after award to demonstrate that no double-billing has occurred or will occur.

Conditional (9a):

a. If any of the infrastructure has already been installed, paid for, or committed to be paid for, please describe the existing infrastructure, what costs have been incurred or committed, and who funded it.

The PowerGrid Plus, which participated in the scoping of this proposal (and budget), has not been formally retained.

C. Solar Photovoltaic Equipment:

1. Which types of solar PV equipment are included in your proposal?
(select all that apply)

☒ PV modules
☒ Inverters (including smart inverters)
☑ Meters
☐ Battery and energy storage systems
☐ Related balance of system (BOS) equipment.

Note: Please see Section H in the CMO Implementation Manual for charging equipment minimum eligibility requirements. Proposals that include ineligible equipment or approaches will not be approved.

2. Please provide a description of your planned infrastructure to be installed by site, with addresses or approximate locations for each installation.

Rooftop solar array at 2020 West Alonzo Circle, Metson, CA; energy channeled to the on-site parking garage to power charge the shared electric bikes.

3. Have you identified target locations for all infrastructure that is part of the project?

(select one)

☒ Yes
☐ No

Note: Applicants may optionally wait to determine the exact site of the following types of infrastructure until the voucher is signed: Level 2 EVSE, Bicycle and Scooter Infrastructure, and Solar Photovoltaic Equipment. However, the location of DC fast chargers and Hydrogen Fueling Infrastructure must be determined by the time of and indicated in the application.

4. Please check all of the following that apply to your solar PV installation.

(select one)

☐ Installation depends on authorization to use public right of way that has not yet been granted
☒ Installation requires a new service drop, undergrounding, or new utility interconnection

Conditional (4a):
a. If any boxes are checked on the previous question, please explain how the project will move forward in the event that authorizations or services are not secured in enough time to allow for a timely project launch.

If the solar component of P2P falls through after the voucher is awarded, bikes will simply draw from the existing power source; the bikes use 110-volt wall outlets and in a large multifamily dwelling like Oak Point would likely not require any upgrade to the utility panel. If this is not the case, then the PowerGrid Plus will work with Pacific Regional Utility the necessary upgrade using the same application process as the DC fast charger.

5. Are permits required to site any of the infrastructure?

(select one)

☒ Yes
☐ No

Conditional (5a):

a. If permits are required, indicate the following for all required permits: Name of permit, permitting agency, status of permit, and summary of plan to obtain permit.

Pacific Regional Utility to forwarded directions to for rooftop solar installation application during engagement for the DC fast charging installation. In September, PowerGrid Plus submitted the general system design and size in its application for utility interconnection. Once this is approved, PowerGrid Plus will submit a supplemental building permit application for rooftop solar. The City of Metson’s Community Planning and Economic Development office estimates an approval turnaround time of 5 to 10 business days. When installation is complete, a city inspector will visit to verify compliance with the municipal electrical code and send notice to Pacific Regional Utility to confirm the meter connection.

6. If the target locations for all infrastructure have been identified, please describe how the requirement for 80 percent of voucher-funded infrastructure or services to be located with the eligible project areas is satisfied.

All supporting solar infrastructure is at the Oak Point housing complex, within the eligible project area.

Note: Response may be given in terms chosen by the applicant (e.g., 80 percent of total capital costs, 80 percent of the area in square miles, 80 percent of vehicle parking and/or chargers, etc.) as needed. If you do not know the site location, provide as much information as possible now, and Program Administrator will seek more information prior to voucher fund disbursements. Also, note that applicants may also to modify their project design following award on a case-by-case basis.
7. Have you already filed a Notice of Exemption (NOE) from CEQA for your project?

(select one)
☐ Yes (please attach)
☒ No, but will file one

Note: A Notice of Exemption (NOE) from CEQA is required for all infrastructure sites. Applicants must provide a NOE prior to redeeming voucher funds. The entity who is responsible to secure the NOE may vary based on site.

Conditional (7a):

a. If you do not have a CEQA NOE for all sites, who are the lead entities that you will likely need to work with to secure them? (Write in or include discussion in separate document).

CleanTech Incubator will work with PowerGrid Plus to file a CEQA Notice of Exemption for the following categorical exemptions:
- § 15301 (Class 1) for Existing Facilities

8. Do you own the property for all of the sites where you propose to install infrastructure and are you fully authorized to install such infrastructure (e.g. free of any agreements or encumbrances that would pose a conflict)?

(select one)
☐ Yes
☒ No

Note: Applications may be approved prior to obtaining all necessary permissions; however, such permissions (or an approved project modification) will be required prior to signing the voucher agreement.

Conditional (8a):

a. If you do not own the property for all of the sites where you propose to install infrastructure and/or need authorization to install such infrastructure, do you have letter(s) of support from the site owner or responsible entity, including relevant public agency in the case of public right-of-way?

(select one)
☒ Yes
☐ No

i. If yes to the question above, please attach letter(s) of support.

(check the box)
☒ Letter of support is attached from Community Housing Partners

ii. Do you require any additional permission?
iii. If yes to the previous question, please describe the additional requirements and your plans to achieve them (write in).

Not applicable

9. Has any part of the infrastructure already been installed, paid for, or committed to be paid for?

   (select one)
   ☐ Yes
   ☒ No

Note: Answering “yes” does not disqualify your application; however, additional documentation may be required after award to demonstrate that no double-billing has occurred or will occur.

Conditional (9a)

a. If any of the infrastructure already been installed, paid for, or committed to be paid for, please describe the existing infrastructure and what costs have been incurred or committed.

PowerGrid Plus, which participated in the scoping of this proposal (and budget), has not been formally retained.

D. Hydrogen Fueling Infrastructure:

Please refer to eligibility criteria for hydrogen fueling infrastructure (Section H.2 and Appendix G of the CMO Implementation Manual). Proposals that include equipment or approaches that do not meet eligibility criteria will not be approved.

1. Please describe the current “base” facility that your hydrogen project will add on to, including the location address, and what new capacity the project will add.

   (write in)

2. Have you identified target locations for all infrastructure that is part of the project?

   (select one)
   ☐ Yes
Note: Applicants may optionally wait to determine the exact site of the following types of infrastructure until the voucher is signed: Level 2 EVSE, Bicycle and Scooter Infrastructure, and Solar Photovoltaic Equipment. However, the location of DC fast chargers and Hydrogen Fueling Infrastructure must be determined by the time of and indicated in the application.

3. Who is the expected supplier or source of your hydrogen?

(write in)

4. Please describe the timeline for construction and launch in a manner that meets requirement to launch within 12 months from the voucher agreement execution date, as required.

(write in)

5. What sources of funding are being used for the hydrogen fueling infrastructure separately from prospective Clean Mobility Options funding and how much funding is being brought by other parties?

(write in)

6. Does installation depend on authorization to use a public right of way that has not yet been granted?

(select one)

☐ Yes
☐ No

Conditional (6a):

a. If the installation depends on authorization to use a public right of way that has not yet been granted, please explain how the project will move forward in the event that authorizations is not secured in enough time to allow for a timely project launch.

(write in)

7. Are permits required to site any of the infrastructure?
(select one)
☐ Yes
☐ No

Conditional (7a):

a. If permits are required, indicate the following for all required permits: Name of permit, permitting agency, status of permit, and summary of plan to obtain permit.

(write in)

8. If the target locations for all infrastructure have been identified, please describe how the requirement for 80 percent of to be located with the eligible project areas is satisfied.

(write in)

Note: Response may be given in terms chosen by the applicant (e.g. 80 percent of total capital costs, 80 percent of area by square miles, 80 percent of vehicle parking and/or chargers, 80 percent of ride pickups, etc.) as needed. If you do not know the site location, provide as much information as possible now, and Program Administrator will seek more information prior to voucher fund disbursements. Also, note that applicants may also to modify their project design following award on a case-by-case basis.

9. Have you already filed a Notice of Exemption (NOE) from CEQA for your project?

(select one)
☐ Yes (please attach)
☐ No, but will file one

Note: A Notice of Exemption (NOE) from CEQA is required for all infrastructure sites. Applicants must provide a NOE prior to redeeming voucher funds. The entity who is responsible to secure the NOE may vary based on site.

Conditional (9a):

a. If you do not have a CEQA NOE for all sites, who are the lead entities that you will likely need to work with to secure them? (Write in or include discussion in separate document).

(write in)

10. Do you own the property for all of the sites where you propose to install infrastructure and are you fully authorized to install such infrastructure (e.g. free of any agreements or encumbrances that would pose a conflict)?
(select one)
☐ Yes
☐ No

Note: Applications may be approved prior to obtaining all necessary permissions; however, such permissions (or an approved project modification) will be required prior to signing the voucher agreement.

Conditional (10a):

a. If you do not own the property for all of the sites where you propose to install infrastructure and/or need authorization to install such infrastructure, do you have letter(s) of support from the site owner or responsible entity, including relevant public agency in the case of public right-of-way?

   (select one)
   ☐ Yes
   ☐ No

i. If yes to the question above, please attach letter(s) of support.

   (check the box)
   ☐ Letter of support is attached

ii. Do you require any additional permission?

   (select one)
   ☐ Yes
   ☐ No

   (write in)

11. Has any part of the infrastructure already been installed, paid for, or committed to be paid for?

   (select one)
   ☐ Yes
   ☐ No

Note: Answering “yes” does not disqualify your application; however, additional documentation may be required after award to demonstrate that no double-billing has occurred or will occur.

Conditional (11a)
a. If any of the infrastructure already been installed, paid for, or committed to be paid for, please describe the existing infrastructure and what costs have been incurred or committed.

(write in)
ATTACHMENT 3

SAMPLE TEAM PROFILE WORKSHEET

FOR THE
MOBILITY PROJECT VOUCHER APPLICATION

CLEAN MOBILITY VOUCHER PILOT PROGRAM
ATTACHMENT 3. Team Profile Worksheet

This worksheet is a required supplement for applications to Mobility Project funding with the Clean Mobility Options Voucher Pilot Program in 2020. Applications will not be processed unless this worksheet is fully completed and included with the application. The Program Administrator may request clarification and additional detail about the team members prior to and after the prospective funding award.

Awardees may need to update their team profile sheet when team members change throughout the duration of project. Technical Assistance is available to help applicants complete the worksheet. Please see www.cleanmobilityoptions.org for contact information.

1. Please list of each organization that is part of the team, with a summary of each organization’s qualifications, and provide contact information for both decision-makers and day-to-day project leads from each organization.

**LEAD APPLICANT: CleanTech Incubator** was founded in 2015, through partners of the Presidential Ambassadors for Global Entrepreneurship (PAGE) advisory group. PAGE was founded by then United States President Barack Obama in 2014 with the intent to increase the business startup culture in the United States. CTI offers resources for innovators with socially and environmentally beneficial startups to develop their ideas and attract seed funding. CTI’s two points of contacts will be Research Manager Yingling Davids (Daying@email.org/555-818-2158), and Executive Director Juan Doe (Dojan@email.org/555-213-5678), as well as a yet-to-be determined Americorps volunteer.

**SUB-APPLICANT 1: Community Housing Partners** is the main CBO on the team (though others may become involved through the project’s Community Advisory Panel). CHP started over 25 years ago provide more affordable housing to low-income farm workers and their families in the Central Valley. CHP is committed to social justice and has a history of providing community resources to its tenants, including financial trainings and after-school programs at its properties (the former through a partnership with a local Community Development Financial Institution and the latter funded through an award from the Neighbor Foundation). Jodi Serrano, CHP’s Partnership Director, brings over a decade in affordable housing policy and will be the project lead. Oak Point’s manager Stephen Sanders (StephSanders@gmail.com/595-215-5807), will be a site-level point of contact and will work closely with the Resident Transportation Coordinators.

**SUB-APPLICANT 2: Dashboard Solutions** has four years of experience of fleet management and digital travel demand management through its software platform. In addition to several years of experience using its MaaS platform to support workplace travel demand.
management campaigns, Dashboard has a small fleet of electric vehicles and shuttles for lease. Alex Yoon (AlexY@email.com/555-221-0700) will be Dashboard’s lead.

**SUB-APPLICANT 3: PowerGrid Plus** is a certified Opportunity Zone Business specializing in commercial and residential energy management and off-grid residential systems. PowerGrid has been in operation for two years, but has partnered with large companies such as Airbnb and Tesla. PowerGrid’s project lead is Gregory Ryan (594-717-9265).

2. **Please describe the overall team structure, including roles and responsibilities of individuals.** Explain how the team will work together, and if there is any legal or other formal relationships between the parties outside of this project.

**CleanTech Incubator** will serve as the lead applicant, providing technical support and subject matter expertise during the program. CTI is an investor of **Dashboard Solutions** and will work with their project lead, Kit Miranda, at each stage of project planning and implementation. After voucher execution, CTI and Dashboard will work with Oak Point staff to identify a vendor for the garage lending hub. While the on-site infrastructure will belong to CHP, Dashboard Solutions will be the one to purchase, own and service the bikes.

CTI (and nominally, CHP) will work with PowerGrid Plus on the necessary permits for vehicle charging and solar equipment. PowerGrid’s contract will be with CHP, the owner of the electric vehicle charger.

3. **Does the team have an agreement or contract in place with all team members who are providing resources to successfully launch and operate the project?**

Select one:
- ☐ Yes
- ☒ No

**Conditional (3a):**

a. **If no, please describe the resources that still need to be brought on to the team and the plan for doing so.**

P2P still needs to finalize vehicle leasing with Dashboard Solutions and an e-bike vendor. Dashboard is a sub-applicant and will move forward after voucher execution.
4. Please provide a list of all organizations who have provided letters of support or letters of commitment to support the project.

Letters of commitment for the Primed to Prosper proposal are included from each applicant organization (additional content noted where applicable):

- **CleanTech Incubator**
  - Project participation
  - Community resource contribution

- **Community Housing Partners**
  - Project participation
  - Community resource contribution
  - DC fast charger installation
  - Rooftop solar installation

- **Dashboard Solutions**
  - Project participation

- **PowerGrid Plus**
  - Project participation
  - Community resource contribution
  - DC fast charger installation
    - Permit narrative
  - Rooftop solar installation
    - Permit narrative

Additional letters of support include

- Oak Point building supervisor
- City of Metson Community Planning and Economic Development
- Pacific Regional Utility
  - Estimate for DC fast charger