

Clean Mobility Options Voucher Pilot Program (CMO)

Request for Information and Applications

for the Clean Mobility Provider Directory Version 2.0

Response Due Date: December 11, 2020 by 5:00pm Pacific Time



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for the Clean Mobility Provider Directory Version 2.0

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This Request for Information and Applications (RFI) is issued solely for information and planning purposes and does not constitute a solicitation. Responses to the RFI will not be returned. Responses to this RFI are not an offer and cannot be accepted to form a binding contract. Respondents are not entitled to compensation for any costs incurred in responding to this RFI.

Responding to the RFI does not prevent or compel participation in other current or future opportunities issued by CARB, the Program Administrator, or CMO Voucher recipients. This document has been reviewed by the staff of the CARB and approved for release. Approval does not signify that the contents necessarily reflect the views and policies of CARB, nor does the mention of trade names or commercial products as a result of this RFI constitute endorsement or recommendation for use.

RFI Overview

The California Air Resources Board (CARB) launched the Clean Mobility Options Voucher Pilot Program (CMO), a voucher-based funding program that seeks to enhance transportation access and advance mobility equity by funding small-scale clean mobility projects for zero-emission carsharing, bike or scooter sharing, ridesharing, and other innovative mobility services in disadvantaged communities and low-income tribes around the State. CALSTART and the Shared-Use Mobility Center (SUMC) are leading a Program Administrator team to build capacity in communities and streamline the delivery of resources.

The Program Administrator is conducting a second RFI process to expand and update the existing CMO [Clean Mobility Provider Directory \(Directory\)](#). Whereas the first Directory focused exclusively on mobility operators, the second version of the Directory will include both updated information of members of the first Directory and expand the list of providers of products and services eligible to be listed in the Directory Version 2.0. The Directory will serve as an informational resource to:

- Allow the CMO Program Administrator to effectively communicate and share information about offerings from interested mobility and service providers.
- Screen mobility and service providers on basic qualifications in order to be listed in the program's Directory.
- Support lead applicants in identifying providers suitable for their communities in an informed and timely fashion.

The intended audiences for this RFI are professional mobility operators, vehicle suppliers, infrastructure suppliers, and software providers—referred to collectively as providers—who are interested in partnering with lead applicants to provide and support zero-emission shared mobility services in eligible communities throughout the State.

This RFI welcomes responses from providers supplying either parts of or all of the elements (turnkey) of a mobility operational system. In this new version, vendors providing individual elements (such as a certain piece of technology or equipment) are eligible to be listed in the Directory and encouraged to participate in a project team.

To be included in the Directory, a provider must meet two minimum qualification criteria:

1. Providers must have at least one year of demonstrated experience providing mobility services, software, vehicles, or infrastructure corresponding to the Directory mobility provider category they are applying to
2. Providers must be registered to conduct business in California and in good standing with the California Secretary of State.

The intent of the Directory is to streamline connections and facilitate partnerships between applicants and providers, so inclusion in the Directory is strongly encouraged. However, the selection of eligible providers is not restricted to those listed in the Directory. Operators are not required to be listed in the Directory to be eligible to participate in voucher projects. Any operator may participate on an applicant team at the time of the voucher application regardless of inclusion in the Directory.

The first two sections of this document includes a summary of the CMO program, project eligibility requirements, and project timeline to help inform the RFI responders. For the complete program eligibility criteria and other details of program design elements please see the CMO Program [Implementation Manual](#) updated in September 2020. The following sections consist of RFI response guidance, including the Directory format, RFI response format, image

request information, key RFI dates, and other submission requirements. The Mobility Provider Questionnaire begins on page 10 of this document and a materials checklist is provided in the appendix to ensure response completeness.

CMO Program Background

Program Goals

CMO aims to increase access to clean transportation while reducing emissions of greenhouse gases (GHG) and criteria pollutants, increase uptake of zero-emission vehicles, and improve air quality and public health in some of the State's most vulnerable communities. Residents living in eligible low-income, disadvantaged, and/or tribal communities will benefit from the use of affordable, reliable, safe, accessible, and clean mobility solutions. In addition, the program provides a platform to test mobility concepts, promote sustainable mobility business models, facilitate partnerships, assess key factors in developing viable and environmentally sound local projects, and build a knowledge base to share and apply lessons learned to future, larger-scale projects throughout the State.

The CMO pilot program provides funding and capacity-building in support of small-scale zero-emissions vehicle-sharing (i.e. bikeshare, scooter-share, carsharing) and ridesharing (i.e. microtransit, vanpool) projects in eligible historically underserved communities. Funds will be used to purchase or lease new or used zero-emission vehicles, bicycles, and other clean mobility options along with associated equipment, infrastructure, and operating costs. The Program Administrator also provides training, technical assistance, tools, and information-sharing opportunities to build the capacity of under-resourced organizations to enhance mobility access in their communities.

Lastly, CMO aims to support project and financial sustainability by encouraging partnerships with professional mobility providers and operators. This Directory will facilitate partnerships to realize this goal. Therefore, the program encourages participation by providers who will commit to playing an active role in making projects sustainable and be key partners in successfully continuing projects in the communities for the required duration of the project, 4 years (at minimum), and ideally beyond.

Funding Availability and Timeline

The CMO Voucher funding is provided by CARB's Low Carbon Transportation Investments with proceeds from the State's Cap and Trade auction proceeds in the Greenhouse Gas Reduction

Fund (GGRF). In 2020, CARB has allocated \$21,150,000 to the Program Administrator, who will distribute \$20,000,000 in Mobility Project Voucher funding to projects - including \$2,000,000 for tribal communities -, and \$1,150,000 in voucher funding for Community Transportation Needs Assessments around the state. The 2020 Community Transportation Needs Assessment Voucher application window opened on June 1, 2020, and the 24 awardees were announced on September 29, 2020. The application window for Mobility Project vouchers opened on October 20, 2020. Payments will be made to voucher recipients on a reimbursement basis as milestones are completed. Please refer to the [CMO Implementation Manual](#) for updated information about the application timelines and program milestones.

CMO Program Design

Program eligibility criteria and other design elements are detailed in the CMO Program [Implementation Manual](#) updated in September 2020. The information below is provided to help inform RFI responders.

Eligible Project Models

CMO Vouchers support the piloting of innovative clean transportation projects that introduce new clean mobility options or test new models, such as “shared” and “on-demand” mobility. Services will be operated with zero- or near-zero emission vehicles such as battery electric vehicles or hydrogen fuel cell vehicles.

The following are the main project models eligible to receive CMO voucher funds:

- Carsharing
- Bikeshare or Scooter-sharing
- Carpooling and Vanpooling
- Innovative Transit Services
- Ride-on-Demand Services

In addition to supporting capital and operating costs to deploy the services described above, CMO Vouchers also fund the installation of infrastructures such as electric vehicle supply equipment (EVSE), bicycle/scooter infrastructure, solar photovoltaic equipment, and hydrogen refueling equipment.

Eligible Applicants

Lead applicants include local and regional government agencies, non-profit organizations, and California Native American Tribes. Lead applicants will submit applications, receive voucher funding, and are responsible for leading and implementing projects in their communities. Lead applicants must demonstrate their legal authorization to do business in California by providing proof of registration and being in active/good standing with the California Secretary of State.

Sub-applicants will contract with lead applicants and could be any public, private, tribe, or non-profit organization. Each funded team is required to include a partner (whether lead applicant, sub-applicant, or subcontractor identified after award) with at least one year of demonstrated experience providing mobility services, as an operator of the proposed service, or in another capacity such as a project technical advisor. Professional mobility operators are encouraged to participate in applications as sub-applicants or subcontractors consistent with the other applicant eligibility criteria described in the Implementation Manual. Sub-applicants must demonstrate their legal authorization to do business in California by providing proof of registration and being in active/good standing with the California Secretary of State.

Maximum Voucher Amounts Per Project

Voucher funding supports a variety of costs associated with implementing clean shared mobility projects, up to \$1,000,000 for new projects and \$600,000 for services that are already operating in a project area. If the proposed project includes a combination of both new services and existing services, the total voucher amount requested can only be up to \$1,000,000.

Performance Period

The Voucher agreement term is up to 5 years from the date the voucher agreement is executed. This includes up to one year for project design, planning, and construction (Planning and Construction Period), and a minimum of four years of service operation (Project Operation Period). Clean mobility projects funded by this program must be fully operating for at least four years from the date of Operation Launch (when participants start using the service).

Voucher Funding Term or reimbursement period is three years from the voucher agreement execution date. During this period, all eligible costs incurred can be reimbursed.

Figure 1. Mobility Project Voucher Agreement Timeline

Voucher Agreement Execution Date	Voucher Agreement Term (5 years)					
	Planning and Construction Period	Operation Launch Date	Project Operation Period (minimum 4 years)			
	Up to 1 year		Year 1	Year 2	Year 3	Year 4
	Voucher Funding Term (reimbursement period) (3 years)					

Mobility Provider Directory

Directory Organization

The Directory serves as an informational resource for lead applicants to identify eligible partners before and after the application process. The first version of the [Mobility Provider Directory](#) was published in January 2020 (Directory 1.0). The Directory 1.0 was updated in July 2020 and can be found [here](#).

Major changes from Directory 1.0 to Directory 2.0 will include 1) expanding the Directory to include the categories of vehicle suppliers, software providers, and infrastructure providers, in addition to mobility operators, and 2) organizing Directory listings by these four categories, instead of a single category by alphabetical order.

The Directory 2.0 will be organized by categories below:

Mobility operators are entities that lead the development and implementation of systems for operating a mobility service, bringing together back-end systems such as user databases and payment platforms with front-facing activities such as vehicle fleet maintenance and day-to-day service provision. Eligible project models and services include:

- Carsharing
- Bikeshare/Scooter-share
- Carpool/Vanpool
- Innovative Transit Services

- Ride-on-Demand Services

Vehicle suppliers are entities manufacturing, selling, or supplying vehicles, bicycles, and electric bikes and other similar devices directly to the buyer. CMO-eligible vehicle technologies and classes include:¹

- Electric vehicles
- Neighborhood electric vehicle (NEV)
- Plug-in hybrid (PHEV) technology for vehicle models with 6-seat capacity or above
- Light-duty passenger vehicles
- Medium-duty vans and shuttle buses
- Bicycles and scooters

Software providers are entities that supply and maintain software applications in support of mobility services. Examples include, but are not limited to:

- Software for payment systems
- Mobility platforms (independent of a mobility provider full-service system)
- Analytical systems that allow for evaluation and system organization
- Reservation and on-demand ride platforms
- Trip planning platforms
- Multi-modal payment platforms
- Mobility-on-Demand routing and dispatching
- Mobility-as-a-Service (MaaS) platforms

Infrastructure suppliers are entities that sell, install, and maintain CMO-eligible infrastructure for vehicle charging or fueling, vehicle and equipment storage, right-of-way improvements and other safety equipment, such as:²

- Electric Vehicle Service Equipment
- Hydrogen Fueling Stations
- Solar Photovoltaic (PV) Equipment (must be qualified under '[Go Solar California](#)')
- Bicycle, electric bicycle, and scooter infrastructure and safety improvements

Providers can be listed in more than one category if their services meet the specific requirements for each category. Applicants must demonstrate that each of the mobility services or products they offer are reasonably distinct and offered independently from each other to be

¹ Directory entrants must provide vehicles eligible for purchase in the CMO program, as detailed in Section G of the CMO Implementation Manual updated September 10, 2020.

² Directory entrants must provide infrastructure eligible for purchase in the CMO program, as detailed in Section H of the CMO Implementation Manual updated September 10, 2020.

listed under different Directory categories. The mobility operator category will be considered the default category for turnkey solutions and cases where mobility services and products are not offered independently from each other. Providers applying for more than one category will need to submit all the required application materials per category.

Providers currently listed in the Directory will not automatically be included in the Directory 2.0. The CMO Administrator will contact the providers listed in Directory Version 1.0 to:

- Confirm providers' interest in being listed in Directory 2.0,
- Provide an opportunity for providers to update their information and choose the Directory 2.0 category that best fit their services and products, and
- Request providers to submit additional materials required for the Directory 2.0 not included in the Directory 1.0 (including images)

The Directory Version 2.0 will be published in a pdf format and will be available at the [CMO website](#). The Directory Version 2.0 is expected to be published in March 2021. The Directory will be expanded and updated periodically through subsequent calls for provider applications.

RFI Response Format

RFI respondents should provide information on the topics listed in the questionnaire below regarding your organization's approach in delivering and/or supplying mobility services and/or devices. **The total length of the response must not exceed 12 pages. Responses must also include all required materials requested in this RFI.**

Responses should be specific to the service or product type being offered. If the respondent is offering multiple service types across different category types, they will need to submit all the required application materials per category according to the Materials Checklist found in Section IV of this document. In responding to the Mobility Provider Questionnaire, a provider applying to more than one category can include similar answers for Sections I and III, if applicable. However, responses to Section II must be different in each application and address the specific services provided for each category. The Mobility Provider Images, as well as the three references, must also be specific for the services offered in each category.

Responses to this RFI are voluntary. The CMO Administrator will use the information submitted in response to this RFI at its discretion and reserves the right to use any submitted information in publicly-accessible reports or other resources for CMO Voucher recipients. **Do not include any information you consider proprietary, classified, confidential, trade secret, or sensitive in your response. A response does not bind or obligate the provider to any agreement of provision or procurement of services referenced.**

Mobility Provider Images

Respondents must submit a high-resolution image of the organization's logo as a stand-alone image file to be included in the Directory.

To help illustrate the type of services and products offered by the mobility providers listed in the Directory 2.0, respondents must also submit at least three (3) but no more than six (6) high-resolution images describing mobility products and services provided.

Examples of additional images include:

- General or detailed images of products or services
- Descriptive images of your services and products in use or deployed in a real-life context
- Technical specifications of products or services
- Maps of current locations where your services and products are in use
- Graphs or schemes describing products and services
- Marketing and communications materials explaining product and services
- Data visualization of product and services performed in other cases

Respondents authorize the Clean Mobility Options Program to publish, distribute, and include the attached images in any program materials. The respondents should send permission and state that the author of the email is authorized to approve the use.

Images can be submitted in .jpeg, .gif, .pdf format to the best quality possible. Images can be submitted as a single pdf document, as an attachment file in the same email message as the rest of the application, or in a separate email immediately following the application submission. Images must be submitted electronically as part of the response to this RFI and at the time of the application, before this RFI due date.

KEY RFI DATES

ACTIVITY:	DATE:
Issue of RFI	Monday November 9, 2020
Webinar for potential RFI respondents	Wednesday December 2, 2020
Submission of RFI Responses	Friday December 11, 2020 by 5:00pm Pacific Time
Comment Period for Draft Entries	Monday February 8, 2021. Final comments due Monday February 15, 5:00pm Pacific Time
Mobility Provider Directory 2.0 Published	March 2021

RFI RESPONSE SUBMISSION AND FOLLOW UP

Any questions regarding this RFI must be submitted in writing via email to RFI@cleanmobilityoptions.org. The email subject line should contain a reference to the “CMO RFI Mobility Provider Directory 2.0”. The Program Administrator will receive questions on the RFI through Friday November 27, 2020 5:00pm Pacific Time. The Program Administrator will then distribute responses via the RFI distribution email list on a rolling basis. Interested parties may request to be added to the RFI distribution email list by emailing RFI@cleanmobilityoptions.org.

If it becomes necessary to revise any part of this RFI, or if additional information is necessary for a clearer interpretation of provisions of this RFI prior to the due date for submissions, an addendum will be distributed through the RFI distribution email list.

Responses to this RFI must be submitted electronically to RFI@cleanmobilityoptions.org no later than 5:00pm Pacific Time on Friday December 11, 2020. The email subject line should contain a reference to the Clean Mobility Options RFI.

After receiving responses to this RFI, the Program Administrator may call the respondent to clarify the information provided in its response. The Program Administrator will then provide an opportunity for eligible respondents to review their entries in the draft Directory before publication.

Mobility Provider Questionnaire

Instructions: Please respond to all questions. Section I must be answered in totality for inclusion in the Directory. If submitting to more than one category please prepare a separate Section II for each service. For example, a mobility operator also offers software distinct from its mobility operations. In this case, complete Section I to include examples of experience for both, then proceed to Section II. In Section II answer for each service separately (service-specific answers). In Section III, complete as a company-specific response as in Section I. Please limit responses to given word limits.

Mark which of the four categories are you applying for (see definitions on page 7-8):

- Mobility Operators
- Vehicle Suppliers
- Infrastructure Suppliers
- Software Providers

Section I. Screening for Mobility Provider Directory: Organization and Services

All responses in this section are required for inclusion in the Directory.

1. Briefly describe your organization, including type and location of incorporation. (up to 200 words)
2. Is your organization licensed/registered to conduct business in the State of California and in good standing with the California Secretary of State? (Yes/No)
3. Describe your organization's experience operating mobility service(s) or providing mobility product(s). Please list specific communities where you have provided those mobility services or products, and detail the number of years operating those services or supplying those product(s). (up to 300 words)
4. Describe your experience, preferences, or limitations operating mobility services or providing mobility product(s) specific to the communities of concern in this program: disadvantaged communities, low-income communities in urban, small urban, rural, and tribal communities. (up to 300 words)
5. Provide three references describing the nature of the relationship and contact information.

6. Provide the name, position, email and phone number for at least one point of contact for the organization.

Section II. Mobility Services and Products: Cost and Revenue Models (Complete Section II for each category selected in Section I)

The CMO Implementation Manual defines maximum allowable reimbursement amounts but allows for variable cost and revenue models associated with project partnerships. In this section, please describe models that are appropriate for advancing equity-focused partnerships between mobility providers and local public agencies or community-based organizations. Responses may be summarized in the Directory but do not bind the respondent to offer these terms to CMO voucher recipients.

If preparing more than one response for Section II please indicate for each which *category* applies.

- Mobility Operators
- Vehicle Suppliers
- Infrastructure Suppliers
- Software Providers

1. **Services:** Describe the specific types of mobility service(s) or product(s) your organization is prepared to operate or supply to serve residents of California's low-income, disadvantaged, and/or tribal communities through the Clean Mobility Options program for each category selected in Section I. Please be specific and provide multiple options or models if relevant. Refer to pages 7-8 of this RFI for examples of acceptable subcategories of services and products. The bulleted list below is provided for additional guidance. (up to 300 words)

Examples of specific services/products:

- Zero-emission, electric vehicle procurement
- Vehicle telematics and other hardware
- Payment platforms
- Reservation/dispatch systems
- Routing technology
- Fleet management (maintenance, insurance, etc.)
- Service operations/staffing
- Electric vehicle supply equipment procurement
- Electric vehicle supply equipment installation
- Electric vehicle supply equipment operations
- Bicycle/scooter parking or charging equipment procurement

- Bicycle/scooter parking or charging equipment installation
- Bicycle/scooter parking or charging equipment operations
- Other (please describe)

2. **Costs:** To support the goal of creating sustainable benefits for underserved communities, please provide details of expected cost-sharing with partners with respect to the services presented in Question 1. Please refer to the [Implementation Manual](#) (Chapter 1, Section F.ALLOWABLE VOUCHER FUNDS) for cost reimbursement ceilings and allowable voucher amounts by category. Consider responses based on a four-year operating period, with costs described on a standardized basis (e.g. dollar-per-vehicle, dollar-per-ride, dollar-per-mile, other per-unit costs). Feel free to include key assumptions and/or dependencies.

- a. What is the appropriate level (or range) of eligible cost-sharing, specific to the operating or provision of the described service(s)?
- b. What costs should be covered by CMO voucher funding versus mobility providers?
- c. Please estimate ranges for the share of total costs represented by various cost categories, including vehicles and other equipment, EVSE and other infrastructure, hardware and software platforms, marketing, and operations and maintenance for services your organization offers. Not all of these cost categories will apply to all respondents.
 - i. Create a table for each type of service proposed from inputs estimated in [c]. An example is provided below:

Cost Category	Share of Total Cost	
	Example	Your Response
Vehicles and other equipment	30-40%	
EVSE and other infrastructure	15-20%	
Hardware and software platforms	8-10%	

Marketing	10-15%	
Operations and maintenance	20-30%	

3. **Revenue:** To support the goal of creating sustainable benefits for underserved communities please provide details of expected revenue-sharing with partners with respect to the services presented in Question 2.a.
 - a. Describe the appropriate pricing models offered by your organization to efficiently manage demand and generate revenue while ensuring affordability in these communities.
 - b. What are examples of appropriate arrangements for the distribution of revenue from the product or service your organization is prepared to enter into with voucher recipients?
 - c. What entities would receive revenue from the service?
 - d. What level, if any, of minimum revenue guarantee does your organization require?

Section III. Statements on Sustainability, Equity, and Data Privacy

Inclusion in the directory supports building partnerships that focus on furthering mobility equity, financial sustainability and rely on clear expectations of data privacy and sharing. In this section, please provide a statement on each topic requested in A-C. Additionally, feel free to provide any further information considered important to your organization and any feedback, as appropriate, on this RFI. Responses do not bind the respondent to offer the suggested terms to CMO voucher recipients.

1. **Financial Sustainability:** The CMO program aims to seed projects that will operate for many years and seeks to involve professional mobility providers who will play a critical role in realizing this goal. Treat a-c as separate answers to provide details of your organization's commitment to project partnerships to ensure sustainability.
 - a. In what way will your organization commit to the sustainability of projects over a minimum of four years of operations? (up to 300 words)

- b. Please describe strategies for working with partners to ensure long-term financial sustainability of services that may not be profitable or recover all costs in the short term. *(up to 300 words)*
 - c. Building on your responses about appropriate partnership models above, please outline any differentiated benefits to project applicants/communities that your organization is willing and able to offer. *(up to 250 words)*
2. **Equity:** Please provide a statement on how your organization promotes equity and is prepared to further equitable access for all the community residents. *(up to 350 words)*

Include, for example, the following items, where applicable:

- a. Community participation in decision-making
 - b. Language translation
 - c. Payment and reservation solutions for the unbanked
 - d. Payment and reservations solutions for those without mobile devices
 - e. Arrangements to enable participation by those without drivers licenses
 - f. ADA accessibility, including but not limited to wheelchair accessible vehicles and resources for the hearing- or vision-impaired
3. **Data Privacy, Management, and Sharing:** Please provide a statement on how your organization complies with data privacy, management, and sharing standards, as described in the [Implementation Manual](#) (Section Z.2.f. Data Storage and Security, page 87). *(up to 350 words)*

Include information regarding the following, where applicable:

- a. Data ownership and rights and/or licenses granted to partners or other third-parties
 - b. Secure data storage
 - c. Data-sharing for project evaluation purposes (e.g. number of trips, location of trip origination and destination, trip length/VMT, cost per trip, kWh per day)
 - d. Protection of personally identifiable information
4. **Comments:** Please include any additional clarifications or information considered important not covered by the questionnaire. Also, please offer suggestions that may be addressed in future RFI versions.

Section IV. Material Checklist

Directory 2.0 Material Checklist	
<input type="checkbox"/>	Name, position, email and phone number of point of contact for the organization
<input type="checkbox"/>	Stand-alone organization's logo file
<input type="checkbox"/>	At least three (3) but no more than six (6) images describing mobility products and services provided.
<input type="checkbox"/>	Section I. Screening for Mobility Provider Directory (7 total questions)
<input type="checkbox"/>	Section II. Mobility Services and Products: Cost and Revenue Models for each chosen category (10 questions and table)
<input type="checkbox"/>	Section III. Statements on Sustainability, Equity, and Data Privacy (6 questions)
<input type="checkbox"/>	Three References