Welcome

Community Transportation Needs Assessment Application Walkthrough

September 7, 2022

Clean Mobility Options

Welcome

Josh Meyer
CMO Program Administrator

Joey Juhasz-Lukomski
CMO Program Administrator

Poll

What type of organization are you representing today?

a) Tribal Government
b) Gov/Transit Agency
c) Nonprofit
d) Other

Agenda

Clean Mobility Options (CMO) Program Overview
- Background
- Program Goals
- Voucher Funding

Community Transportation Needs Assessment (CTNA) Overview
- Funding Amount
- Eligibility
- Application Process

CTNA Application Walkthrough
- Step-by-Step Guidance

Next Steps
- Opening Date
- TA and Support

Clean Mobility Options Voucher Pilot Program Overview

Clean Mobility Options Program

A statewide public program that empowers under-resourced communities across California to **identify and overcome mobility obstacles** with funding for community needs assessments and zero-emission, shared transportation projects.

Clean Mobility Options is part of California Climate Investments (CCI), a statewide initiative that puts billions of Cap-and-Trade dollars to work reducing greenhouse gas emissions, strengthening the economy, and improving public health and the environment — particularly in under-served communities, and California Energy Commission's Clean Transportation Program, which is investing more than $1 billion to accelerate the deployment of zero-emission transportation infrastructure and support in-state manufacturing and workforce training and development.

Clean Mobility Options Program Goals

- Increase zero-emission, shared mobility choices for all Californians, including disadvantaged communities, low-income communities, and Tribes.

- Fund **community-driven** shared mobility solutions

- Improve access to clean mobility options that are **safe, reliable, convenient,** and **affordable** to communities throughout California

- Reduce **greenhouse gases** and criteria pollutants

Clean and Shared Transportation

Zero Emission:

- Carsharing

- Bikes-sharing/Scooter-sharing

- Carpooling/Vanpooling

- Microtransit (or Innovative Transit)

- Fixed Route Transit

- Ride-on-Demand
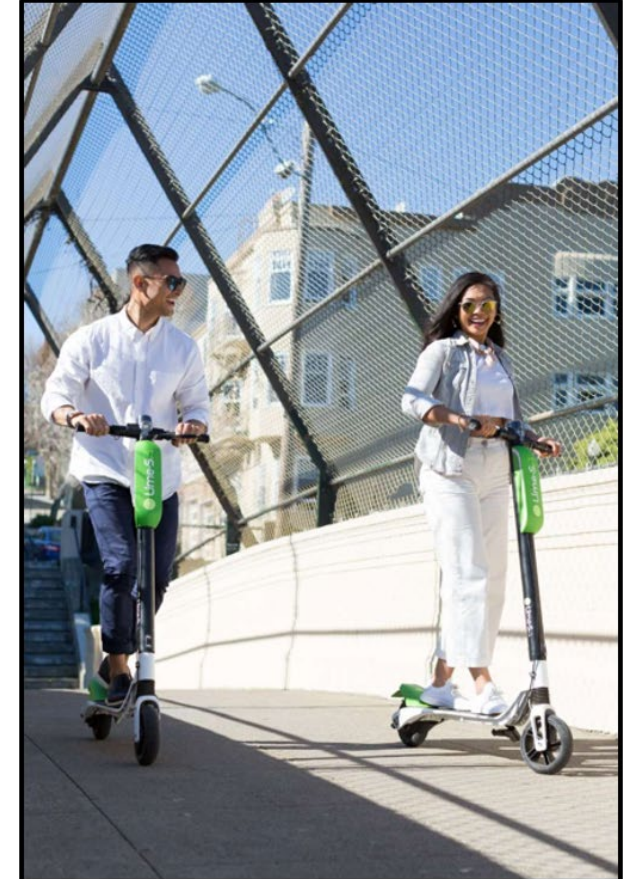
CMO Funding Amount of at least $21 Million

Community Transportation Needs Assessment (CTNA)

- 12 Month Term
- $1 Million Total is available
- Up to $100,000 per CTNA Project
- Up to $200,000 set-aside for eligible Tribal Governments

Mobility Project

- 5 Year Term
- At least $20 Million Total available
- Up to $1 Million per Mobility Project
- $2 Million set-aside for Tribal Governments
- $10 Million set-aside for previous CTNA Awardees

CMO is a Voucher-Based Program

- **Voucher Agreement:**
  - Contract between the CMO Program Administrator and Awardee that serves as "Promise of Payment"

- **Payments Issued:**
  - **When project milestones are reached** based on the Voucher Agreement terms

Community Transportation Needs Assessment Overview

CTNA Application Guide

Application Guide:

- To use as a reference throughout application process

- Provides examples and guidance for each step of the application

Implementation Manual:

- For the full program requirements

Clean Mobility Options

What is a Community Transportation Needs Assessment?

Identification and evaluation of transportation access needs, preferences, and priorities in underserved communities through meaningful, representative community engagement and leadership.

CTNA Components:

- Transportation Access Data Analysis:
  - Community Survey
  - At least three data sources

- Community Engagement
  - Minimum 2 engagement activities

- Final Summary Report

Why Complete a Needs Assessment?

OUTCOMES

Capacity Building

- Build Relationships in Community
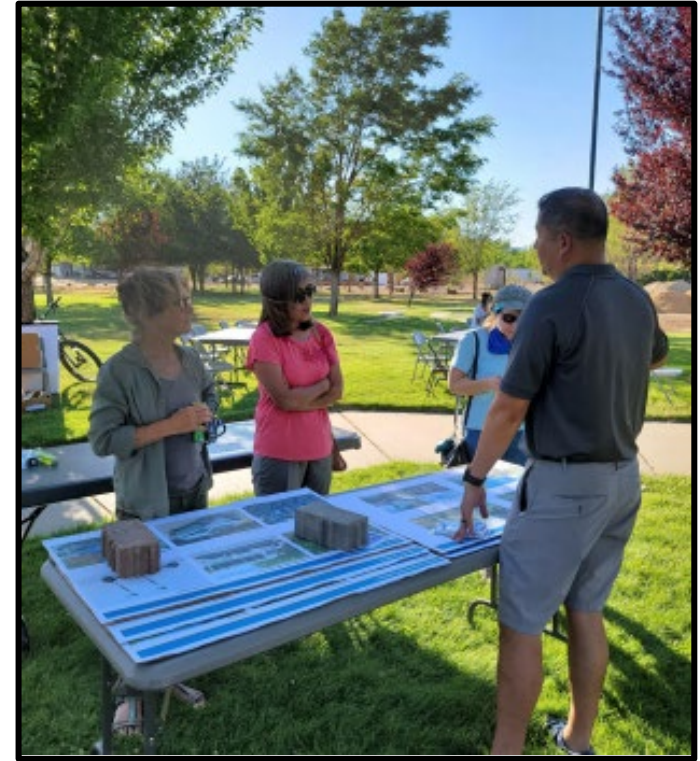- Community-led Projects
- Issue Education

Leverage for More Funding

- Grants that score community engagement (ATP, AHSC)
- CMO - Next Window of MPV to implement a clean shared mobility project in your area
- Advocacy tool

CTNA Funding

- 12 Month Term

- $1 Million Total is available

- Up to $100,000 per CTNA Project

- Up to $200,000 set-aside for eligible Tribal Governments

Eligible Project Areas

- **CalEnviroScreen 4.0** Disadvantaged Communities

- **AB 1550 Low-Income Communities**

- **Tribal Lands** within AB 1550 Low-Income Communities or DACs

Legend

- SB 535 Disadvantaged Communities & AB 1550 Low Income Communities

- SB 535 Disadvantaged Communities (DACs)

- AB 1550 Low Income Communities
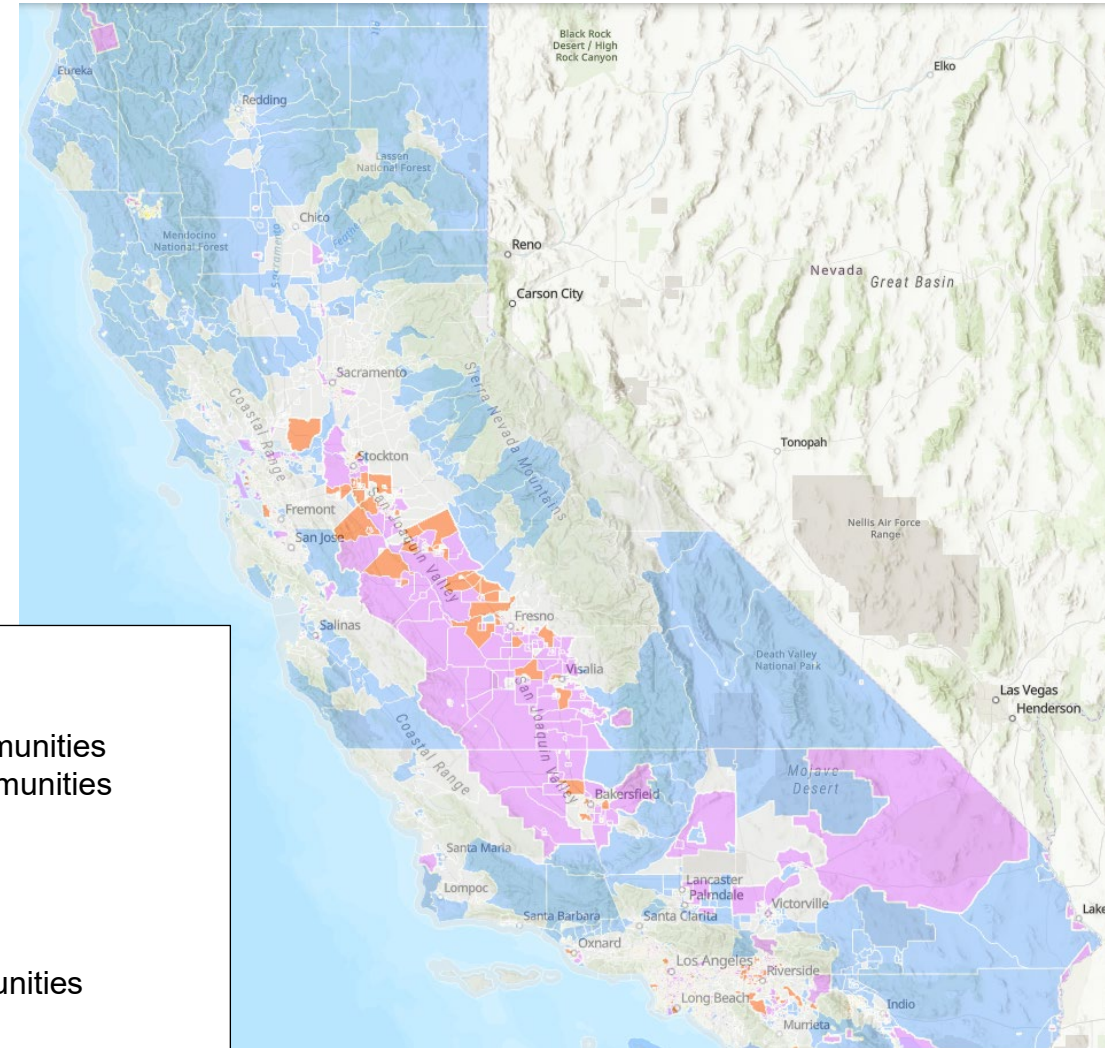
Eligible Applicants

Lead Applicants

- Public Agencies

- Nonprofit Organizations

- Tribal Governments

Sub-Applicants

- Public, Private or Nonprofit Organizations

- Includes providers of
  - Community Outreach
  - Technical Expertise
  - Consulting Services

CTNA Application Process

CTNA Application Process
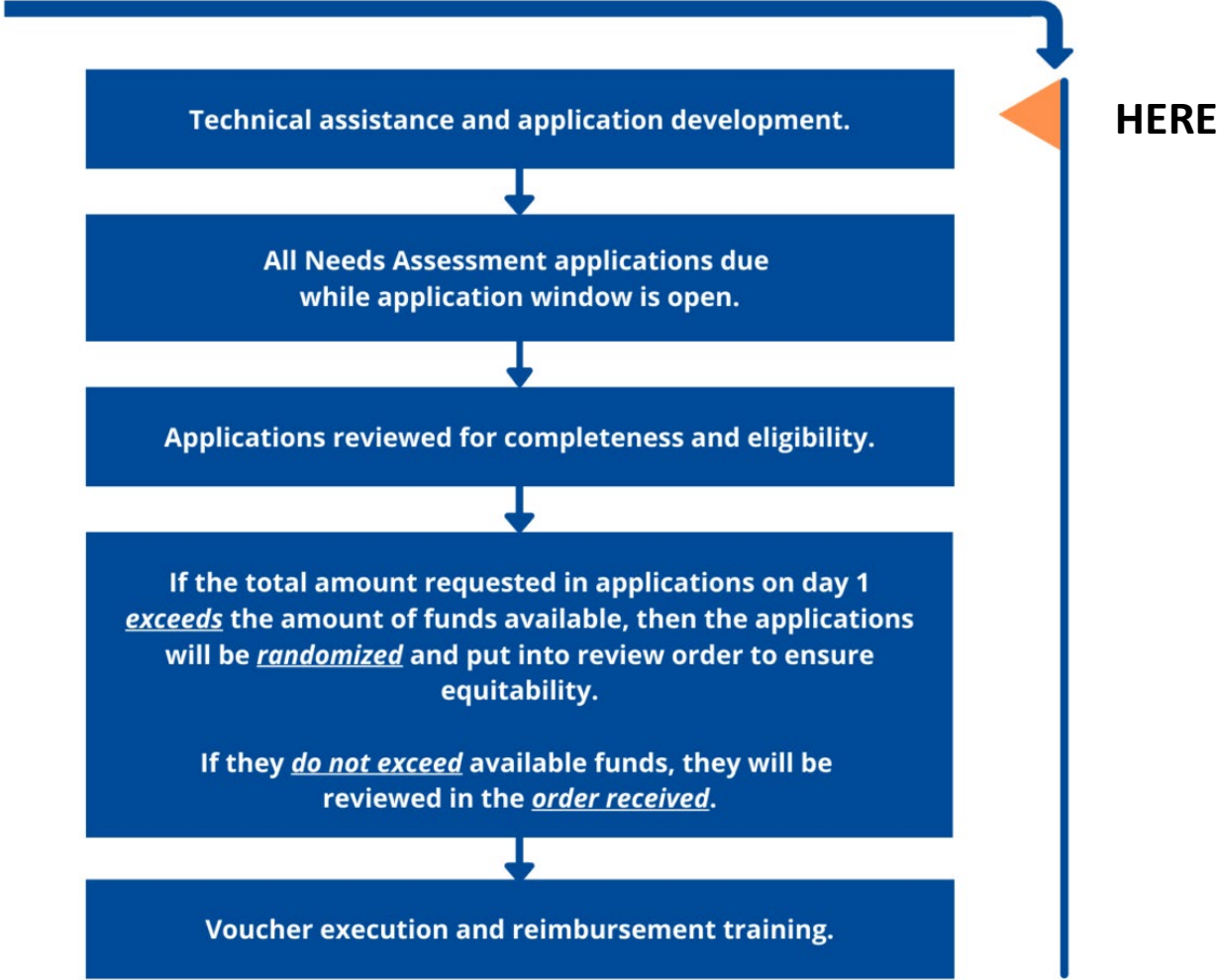

NEEDS ASSESSMENT VOUCHER APPLICATION PROGRESS BAR

Technical assistance and application development. **HERE**

↓

All Needs Assessment applications due while application window is open.

↓

Applications reviewed for completeness and eligibility.

↓

If the total amount requested in applications on day 1 *exceeds* the amount of funds available, then the applications will be *randomized* and put into review order to ensure equitability.

If they *do not exceed* available funds, they will be reviewed in the *order received*.

↓

Voucher execution and reimbursement training.

Window-Two CTNA Application Process DATES

November 2, 2022, at 9:00 am PT

- Application Portal Opens for CTNA

December 7, 2022

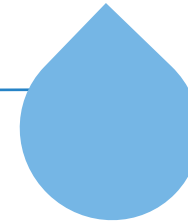- CTNA Application Window Closes

November 9, 2022

- In the event funding is oversubscribed on the first day of the application window opening the Administrator will implement a randomization process
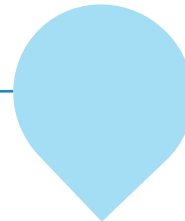
Where to Apply for Your Needs Assessment?

Fillable Application Form:

cleanmobilityoptions.org/na-application/
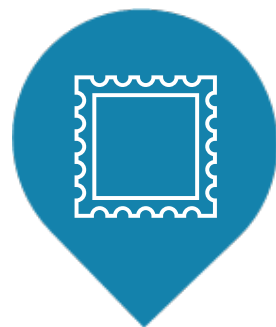
Applications can be mailed to:

CALSTART
48 South Chester Ave.
Pasadena CA, 91106

Applications and supporting documentation can be emailed to:

application@cleanmobilityoptions.org

Application Submission Requirements
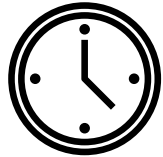
Timestamps:
- Based on the Date and Time the application is received by the Program Administrator's email system or the postmark date and time
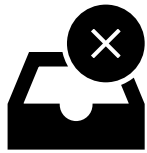
No Early Submissions:
- Early submissions will be rejected
- Early applications will not be returned

No Incomplete Submissions:
- Submitted applications must be complete with all required documents to be evaluated

Application Review and Awards

1. **Review:** Administrator begins the review process after receiving your application.

2. **Grace Period:** Applicants may be asked to provide clarifications to application without losing place in the queue

3. **Notification of Awards:** To notify applicants within eight-weeks after submission window closes

4. **Post-Notification of Awards:** Applicant must have approvals from board, council, or necessary authority before signing voucher agreement

Questions

CTNA Application Walkthrough

Application Requirements

Project Team Profile

Project Narrative & Proposed Approach

Project Area

Proposed Budget

Letters of Commitment or Support

Other Supporting Documentation
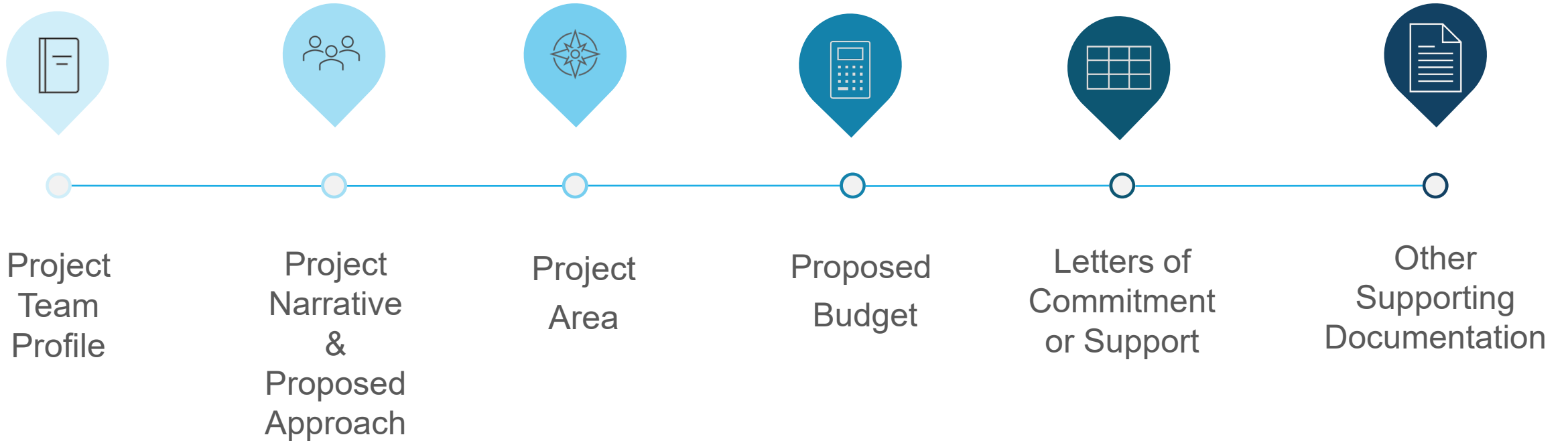
Section 1: Primary Contact Information

SECTION 1. PRIMARY CONTACT INFORMATION

Click here for guidance on section 1.

Individual's Name *	Title *	Email Address *	Phone *	Additional Information
Fill in	Fill in	Fill in	Fill in	Fill in
First and last name of lead applicant's primary contact for application correspondence.	Title or role in the organization.	Email address for submission receipt and other application correspondence.	Phone number of primary contact.	Additional information about communication, coordination, or accessibility. For example, "I am hard of hearing." (optional).

Section 1: Primary Contact Information

Primary Contact can save, submit and return to the saved application

They must be authorized by the Lead Applicant's Organization to act on behalf of the organization

Additional Information is Optional

Section 2: Applicant and Team Profile

SECTION 2. APPLICANT AND TEAM PROFILE

Click here for *guidance* on section 2.

Lead Applicant Organization Name *

[Fill in]

Lead applicant entity's formal name. If applying as a tribal government, this is the name of the tribal government.

Lead Applicant Organization Address *

[Address Line 1]

[Address Line 2]

[City] [State ⌄] [Zip Code]

Legal business address of primary contact for the Lead Applicant. Will be used for official correspondence.

Lead Applicant Organization Type *

○ Non-Profit Organization

○ Tribal Government

○ Public Agency

☑ Application Includes Sub-Applicants
Check if the application includes Sub-Applicants. Sub-Applicants are entities who enter into a partnership with the Lead Applicant to apply for CMO funds.

List All Sub-Applicants. Indicate all entities other than the Lead Applicant who enter into a partnership with the Lead Applicant to apply for CMO funds.

	Organization Name	Role in Project	Organization Type
⊗	Fill in	Fill in	Select
⊗	Fill in	Fill in	Select

[+ Add Item]
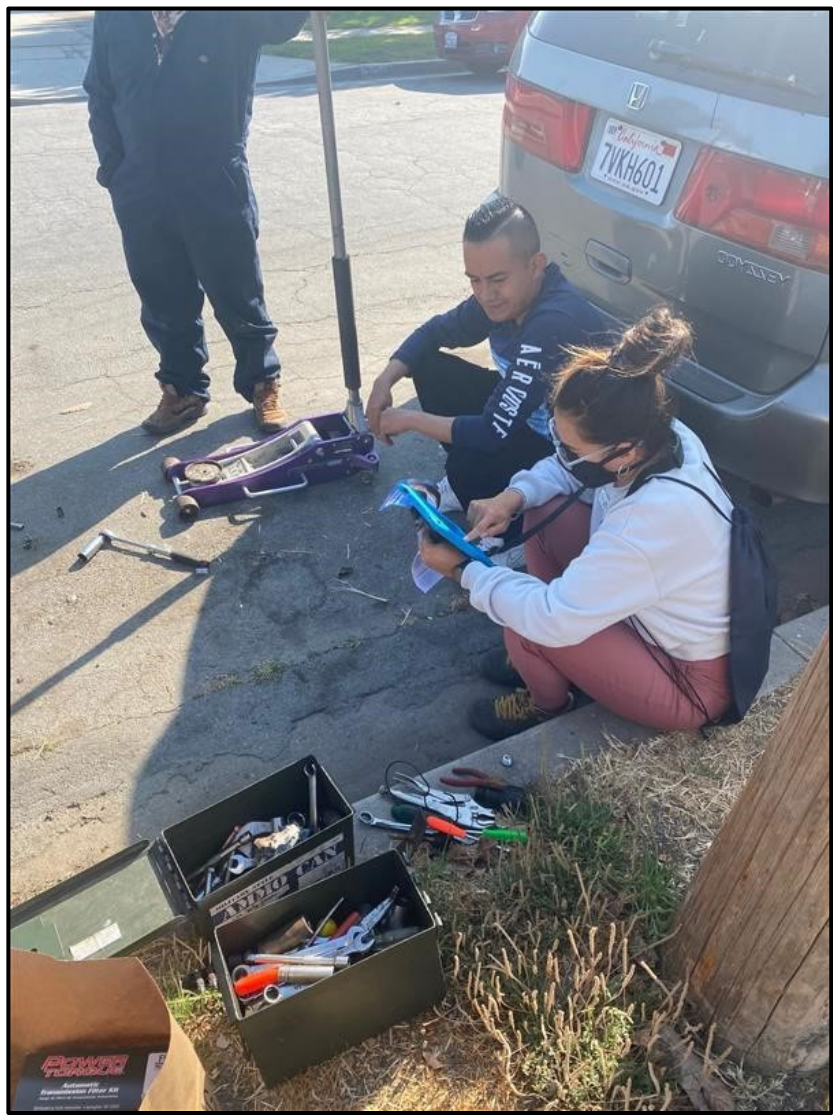
Section 2: Applicant and Team Profile

Lead Applicants:

- Address basic details about the party leading the application

- Enter into a legal agreement with CMO Administrator

- Legally responsible for project implementation and oversight of entire team.

Sub Applicants:

- Describe how they support the project

Examples:

- o Conducting Community Outreach
- o Providing Technical Support
- o Mapping and Design Services

Section 2: Applicant and Team Profile

Description of Team's Qualifications to Conduct the Needs Assessment *

Description of team's qualifications in 6000 characters (which is about 2 pages) or less.

- History of Local Engagement and trust-building
- Key Areas of Expertise
- Your Understanding of Equity
- Examples of representing or advocating for the community

Description of Team's Connection to the Community *

Description of team's qualifications in 6000 characters (which is about 2 pages) or less.

- Relationships of Project Team and target population or community
- Ties to Grassroots and Community-based organizations in project area

Section 3: Project Narrative

Explanation of Why a Transportation Needs Assessment is Needed *

> Fill in

Max length is 6000 characters (which is about 2 pages).

Summary of Existing Regional or Community-Level Transportation Needs Assessment Efforts *

> Fill in

Max length is 6000 characters (which is about 2 pages).

Description of Potential Transportation Gaps and Solutions that the Needs Assessment will Address *

> Fill in

Max length is 6000 characters (which is about 2 pages).

Description of Timeline and Plan for Activities Conducted to Satisfy the Required Elements of the Transportation Needs Assessment Methodology *

> Fill in

Max length is 6000 characters (which is about 2 pages).

Section 3: Project Narrative

1 **Why is a Transportation Needs Assessment Needed?**

- Discuss the history of environmental and social/economic challenges.

- Describe areas of disinvestment, intentional neglect, and the built environment.

- What are the populations, communities, demographics historically underrepresented in community transportation or environmental planning?

Section 3: Project Narrative

2 **Summary of Existing Transportation Needs Assessment Efforts**

What are the existing regional or community level transportation needs assessment (planning) efforts?

- Sustainability Plans
- Active Transportation Plans
- Specific Plans

What will you be doing that's new or different?

- New Strategies
- New Connections
- Community Leadership

Section 3: Project Narrative

3 **Potential Transportation Gaps and Solutions the CTNA will Address**

- What gaps exist?

  - Key unanswered questions
  - Lack of knowledge
  - Insufficient engagement
  - Limitations with methods that have been employed
  - Outdated analyses

- What do you think the community might propose as potential solutions?

- Unmet needs in transportation, mobility or accessibility

Section 3: Project Narrative

4 **Timeline and Plan for Activities to Satisfy the CTNA Methodology**

Transportation Access Data Analysis
- Description of Plan to Administer Survey
- Description of Data Collection Approach (at least 3 sources)

Community Engagement Plan
- Description of plans to engage with the community to conduct a CTNA

Final Report
- Description of timing and process for developing the Final Report and plans for distribution to the community and local decision-makers.

Clean Mobility Options Project Preparation and Design (optional)
- Why and how the mobility project is needed based on the needs assessment

Section 3: Project Timeline

Activity	Month 1-2	Month 3	Month 4-5	Month 6	Month 7	Month 8-9	Month 10	Month 11	Month 12
Develop and Draft Resident Survey		X							
Transportation Data Analysis	X	X							
Conduct Resident Survey			X	X	X	X			
Conduct Bike Repair Outreach			X	X	X	X			
Light Distributions					X	X			
Online Webinar/Listening Session						X			
Social Media		X	X	X	X	X			
Phone Interviews				X	X	X			
Mobility Device Demonstration						X			
Summary Report							X	X	X
Summary Report Presentations									X

Section 3: Project Narrative

Needs Assessment Planning Resources

- [Community Engagement Guide](#)

- [Community Engagement Guide Appendix](#)

- [Survey Guide w/ Sample Surveys](#)

- [Data Collection Guide](#)

- [Data Collection Appendix](#)

Questions?

Section 4: Project Area

SECTION 4. PROJECT AREA
Click here for *guidance* on section 4.

Where is Your Project Located?

☐ SB 535 Disadvantaged Communities (see Map Reference)

☐ AB 1550 Low-income Communities (see Map Reference)

☐ Tribal Lands, only when within SB 535 Disadvantaged Communities or AB 1550 Low-income Communities

Check at least one option for which your Project Area meets CMO program eligibility requirements. Your services must support residents who live and reside within the above selection.

Eligible Census Tracts of Project Area *

Fill in

Provide a list of census tract(s) in your Project Area. Census tracts contain six digits, a 4-digit basic code between 0001 and 9999, and may have a 2-digit suffix ranging from .01 to .98. Lookup tool at: https://geomap.ffiec.gov/FFIECGeocMap/GeocodeMap1.aspx. If multiple census tracts, please separate with commas.
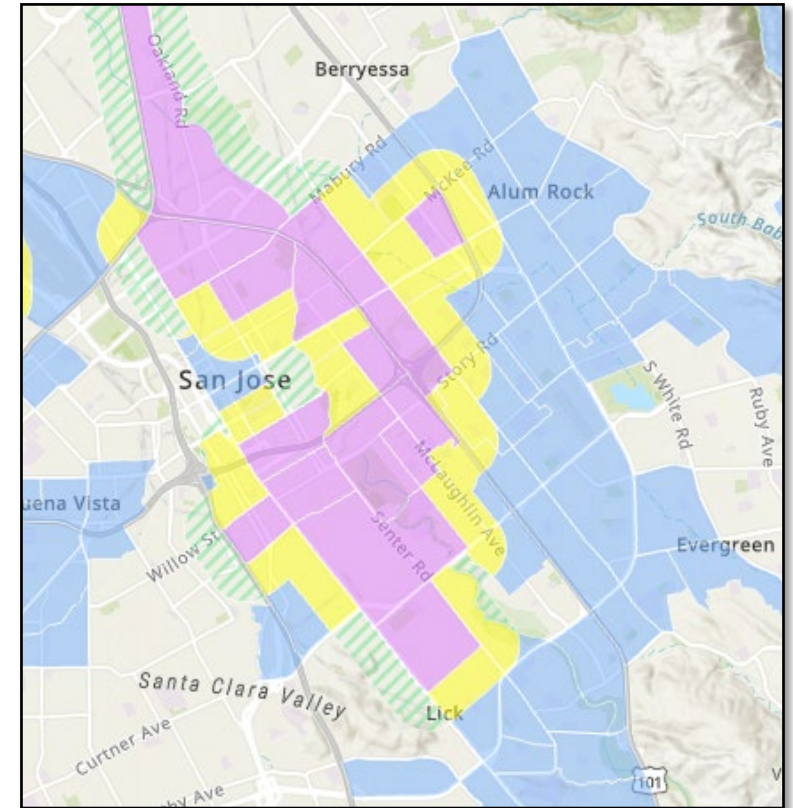
Project Area Setting Description *

Select ⌄

Choose the closest description. The Project Area is defined as the geographic area where community residents live and most infrastructure is to be installed. Only select "unincorporated community" if none of the Project Area falls within an incorporated area.

Map Reference:

SB 535 Disadvantaged Communities map:
https://calepa.ca.gov/envjustice/ghginvest

AB 1550 Low-income Communities map:
https://webmaps.arb.ca.gov/PriorityPopulations

Section 4: Project Area

Where is your project located?

- **CalEnviroScreen 4.0** SB 535 Disadvantaged Communities

- **AB 1550 Low-Income Communities**

- **Tribal Lands** within AB 1550 Low-Income Communities or DACs

- **Census Tract Lookup Tool**

Section 4: Project Area

Project Area Setting Description *

Select ▾

| Select |
| One or mutliple neighborhoods within an incorporated city/town |
| Most or all of one city/town |
| Multiple cities/towns |
| Unincorporated community |
| Tribal land |
| Other |

- Only select "Unincorporated Community" if and only if none of the project area falls within an incorporated area.

- Each lead applicant may only submit one CTNA application for an eligible area

Section 4: Project Area

Name of County (or Counties) *

Fill in

Name of county represented by your Project Area.

Description of Demographics

Fill in

Max length is 3000 characters (which is about 1 page).

Project Area Map *

Upload or drag files here.

Upload your Project Area map here. File types accepted: .doc, .docx, .ods, .txt, .pdf, .xls, .xlsx, .csv, .ppt, .pptx, .jpeg, .jpg, .gif, and .png.

Who are the target demographics that will benefit from the project?
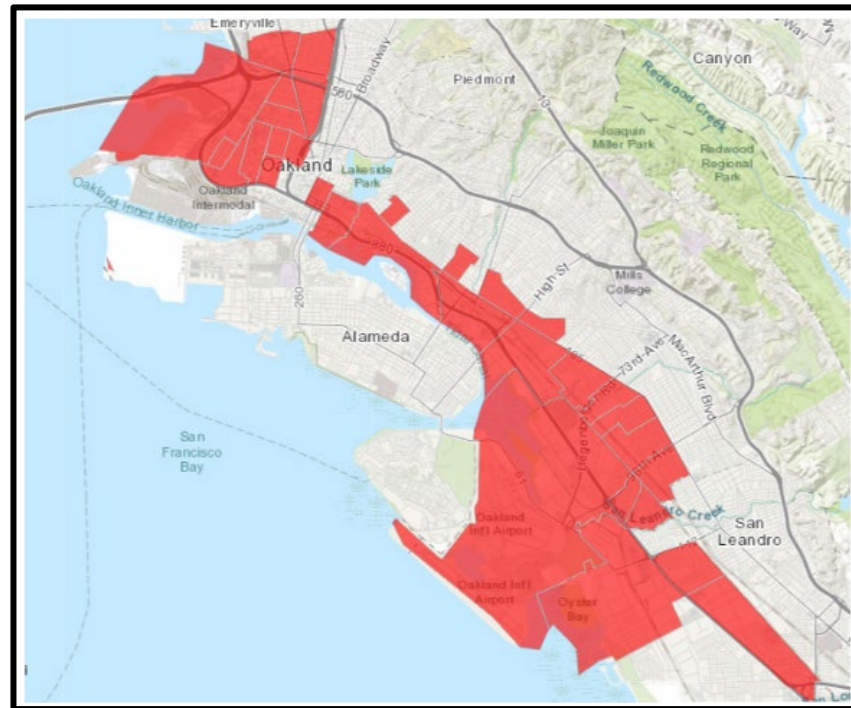
Data you could use:
- Income
- Household Size
- Age
- Race
- Gender
- Languages Spoken
- *Anything else you think is relevant*

Section 4: Project Area

Project Area Map *

Upload   or drag files here.

Upload your Project Area map here. File type may be PDF, (.pdf), Word (.doc), Excel (.xls), and PowerPoint (.PPT). Up to three files, maximum of 20 MB each.
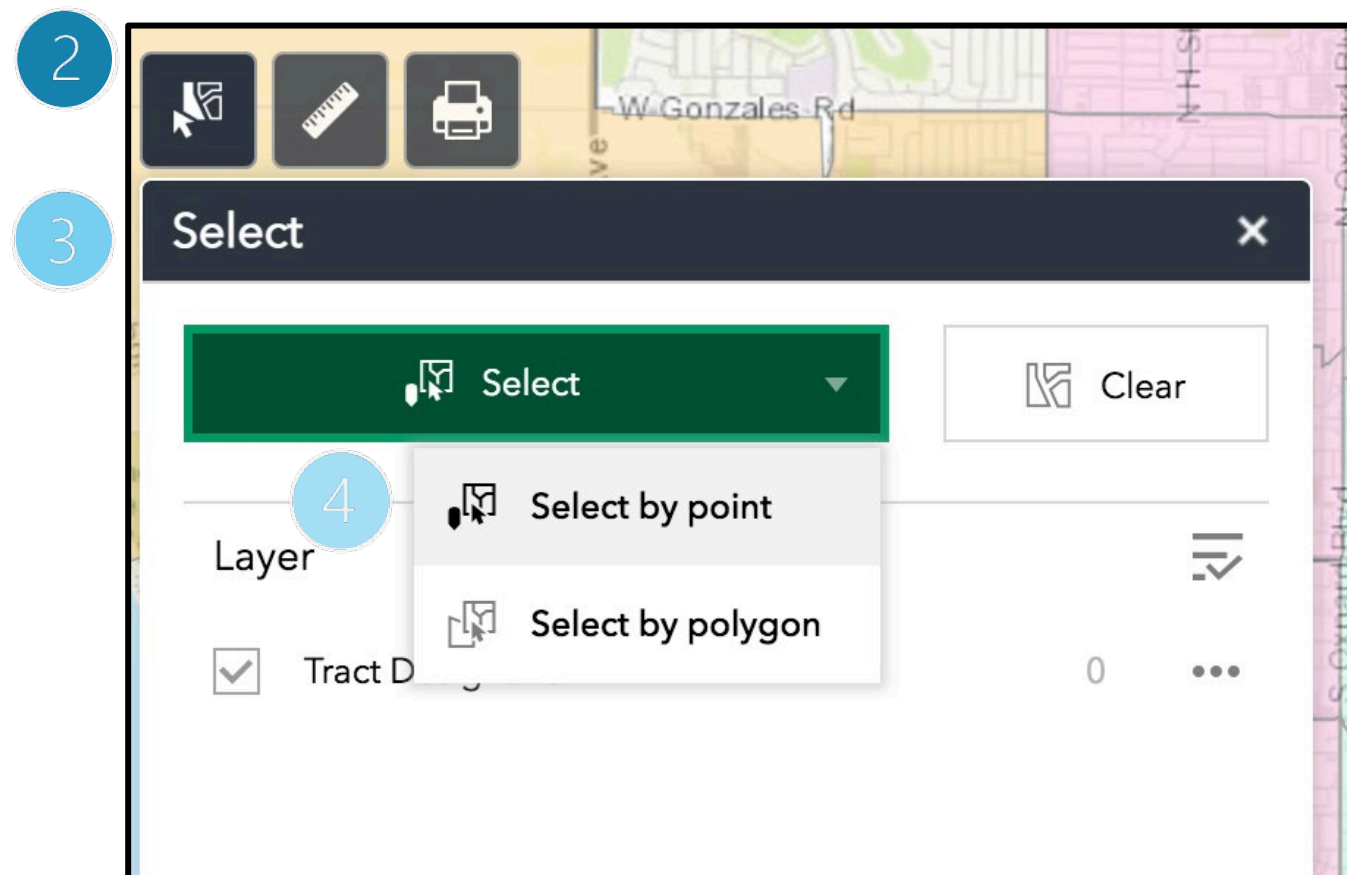

LINK to CMO Mapping Tool

Section 5: Project Area

<u>Using the CMO Mapping Tool</u>

1   **Find your project area**

2   **Click the Icon**

3   **Click 'Select'**
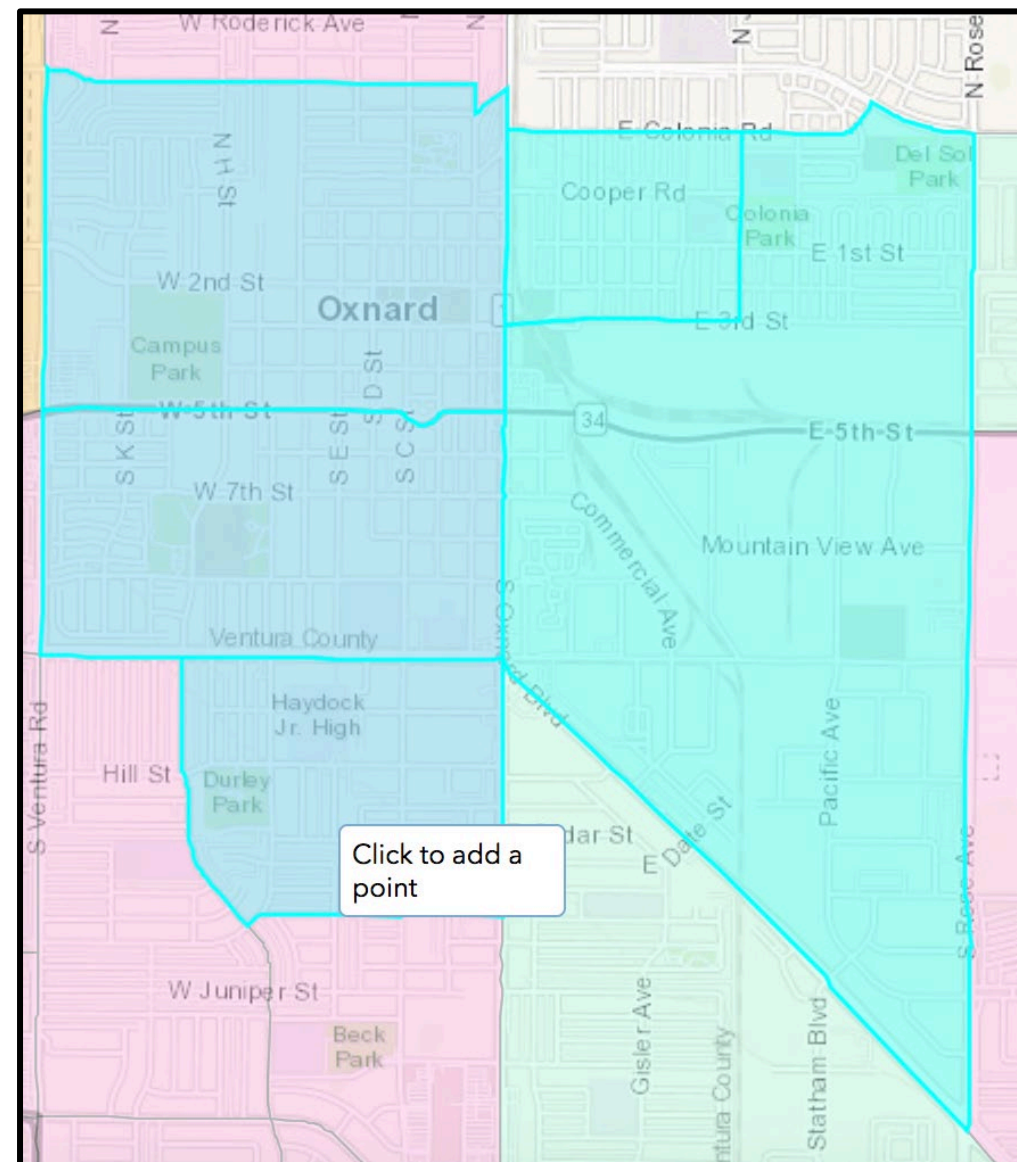
4   **Click 'Select by Point'**

Section 4: Project Area

⑤ Then, Click on your project area

- The Census Tract will be highlighted

- If there are multiple tracts, click on them while holding SHIFT to highlight more than one at a time.
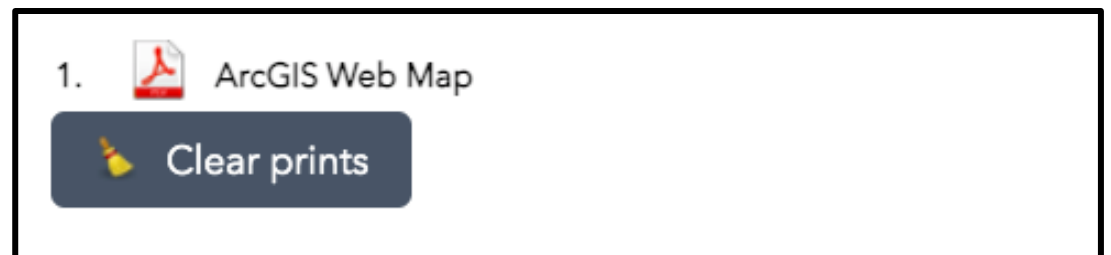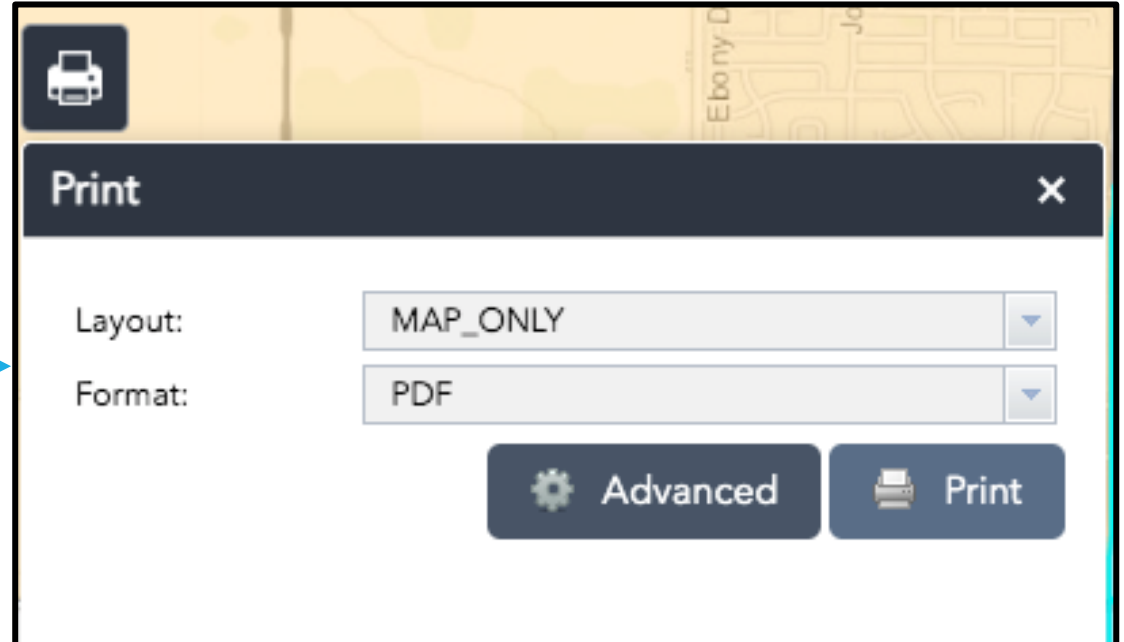
Section 4: Project Area

STEP 1:
Click the Printer Icon

STEP 2:
Do NOT Adjust Layout and Format

STEP 3:
Click HERE and A PDF of your project area has been created!
Upload it through the application.

Section 5: Budget Summary

SECTION 5. BUDGET SUMMARY
Click here for *guidance* on section 5.

Enter Your Requested Voucher Amount *

Fill in (up to $100,000)

Budget Using the CMO Template

Upload | or drag files here.

Attach a budget using the template from www.cleanmobilityoptions.org/application (required). Up to three files, maximum of 20 MB each. File types accepted: .doc, .docx, .ods, .txt, .pdf, .xls, .xlsx, .csv, .ppt, .pptx, .jpeg, .jpg, .gif, and .png.

CMO Budget Template:

www.cleanmobilityoptions.org/application

Section 5: Budget Summary

- Provide a Budget Summary with estimated project costs
  - Template Provided

- Budget will become the basis for future payment requests

- Refer to [Section P in the Implementation Manual](#) for all eligible costs.
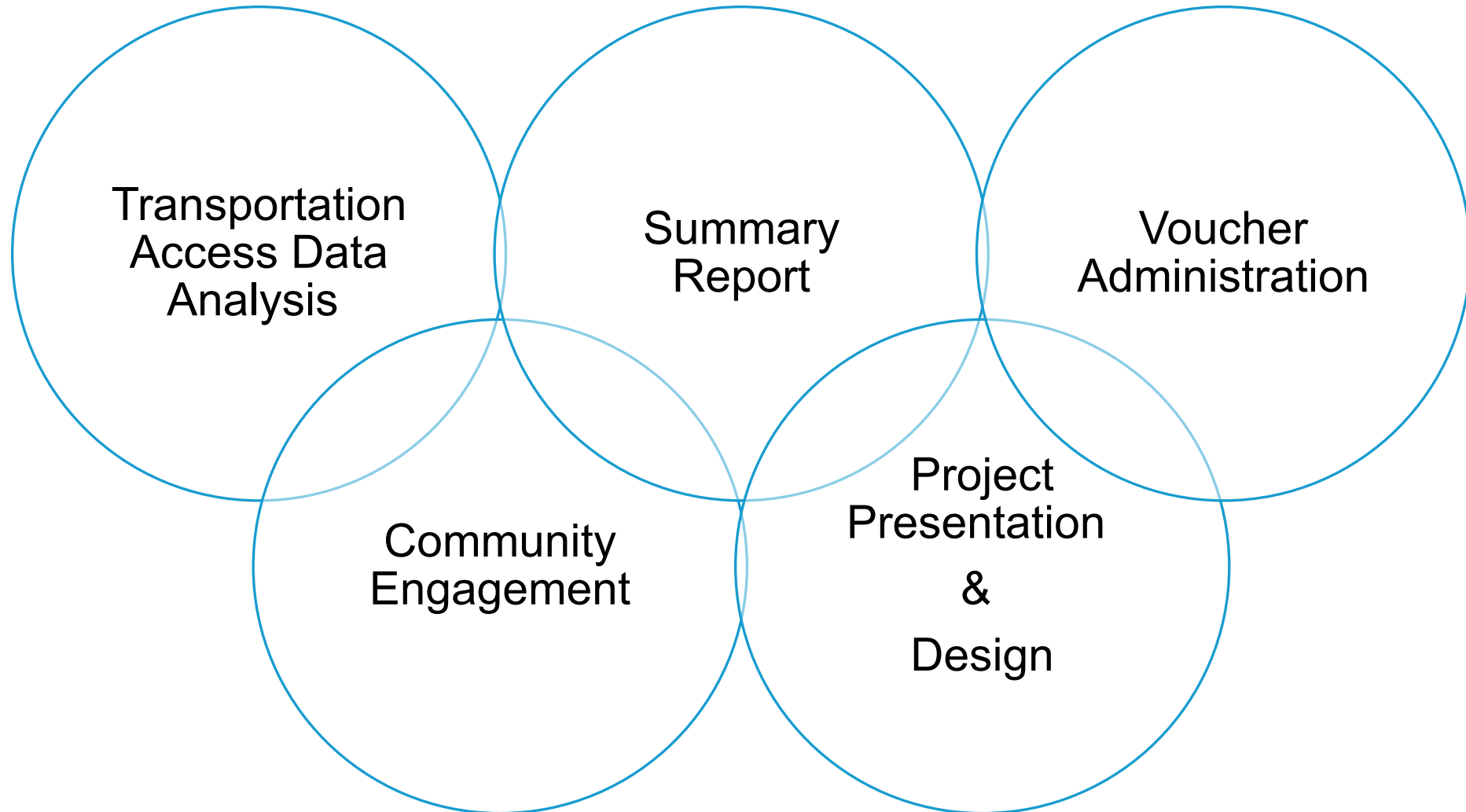
Section 5: Budget Summary

Needs Assessment Voucher Budget Worksheet (INCLUDES SAMPLE INFORMATION)

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.

Section 1: Project Components		Section 2: Description of Voucher Request		
(a) Expense Category	(b) Item description	(c) Voucher amount requested per unit or hour ($)	(d) Number of units or hours requested	(e) Total voucher amount by item ($)
Transportation Access Data Analysis	Manager time	$20/hr	80 hrs	$1,600
	Associate 1 time	$15/hr	80 hrs	$1,200
	Associate 2 time	$15/hr	80 hrs	$1,200
Community Engagement to Determine Gaps, Needs, and Preferences	Manager time	$20/hr	80 hrs	$1,600
	Associate time	$15/hr	80 hrs	$1,200
	Meeting events	$1,000	3 events	$3,000
Summary Report	Manager time	$20/hr	120 hrs	$2,400
	Associate 1 time	$15/hr	80 hrs	$1,200
	Associate 2 time	$15/hr	80 hrs	$1,200
Project Preparation and Design	Manager time	$20/hr	80 hrs	$1,600
	Associate 1 time	$15/hr	80 hrs	$1,200
	Associate 2 time	$15/hr	80 hrs	$1,200
Voucher Adminstration Costs	Travel	$100/mo	9 mos	$900
	Printing	$50/mo	9 mos	$450
	Mail	$50/mo	9 mos	$450
Grand Total				
Grand Total - Voucher Funding Term (Voucher Funds)		n/a	n/a	$20,400
Notes:				

Eligible Costs

CTNA funds may be applied to eligible cost relating to the following categories

Transportation Access Data Analysis

Summary Report

Voucher Administration

Community Engagement

Project Presentation & Design

Section 5: Quick Tips

CMO covers many expenses including:

- Public Engagement
- Marketing
- Travel/Mileage
- Supplies
- Labor Overhead
- Subcontractor/Consulting
- Other

Consider all hidden costs:

- Insurance
- Overhead
- Administration
- Clean Mobility Equity Alliance (CMEA) Costs

Avoid granularity or being too specific:

- Projects are dynamic

Questions?

Section 6:
Community-Based Organization Support

CBO Requirements (must meet 2):

1 The organization is place-based, with an explicit geographic focus area that includes the proposed project area;

2 Staff members, volunteers, or Board members reside in the community where the project is located; and

3 The organization has a demonstrated track record of at least one year providing services in the proposed project area.

Section 7: Supporting Documents

This section contains an optional field for all applications that wish to submit additional information and required follow-up fields for some Applicants

Some examples of supporting documents include:

- Letter(s) of commitment from a Local or Regional Public Agency
- Evidence of Tax-Exempt Status with the IRS or State
- Evidence of Lead Applicant Incorporation for at least one year

Section 8: Signature and Attestation

- Primary contact acknowledges and will comply with critical program and application rules and procedures.

- Please ensure that the whole team **including legal counsel** has read through and agrees to comply with all **program requirements and terms and conditions described** in the IM.

Additional Resources

CTNA Sample Application

more information about Phase 2, see the Application Guide at https://3xf.e49.myftpupload.com/mpvappguide1.

COMPANION APPLICATION GUIDE:

The Application Guide is a companion to this application form with tips for answering each question. We recommend that you read the guide before starting the application. "Guidance" links in the application questions below will take you to their corresponding sections in the guide to make this resource easy to use as you progress through your application.

please contact the CMO Application Technical Assistance with your request.

MORE INFORMATION AND SUPPORT:

Technical assistance is available to help complete the application:

- Email: info@cleanmobilityoptions.org
- Phone: (626) 744-5760
- Web: www.cleanmobilityoptions.org/help

SECTION 1. PRIMARY CONTACT INFORMATION

Individual's Name	Title	Email Address	Phone	Additional Information
Juan Doe	Executive Officer	DoeJuan@email.org	(555) 555-2345	

SECTION 2. APPLICANT AND TEAM PROFILE

Lead Applicant Organization Name
CleanTech Incubator

Lead Applicant Organization Address
321 First Street, Suite 101, Zenith Beach, California 90000

Lead Applicant Organization Type
Non-Profit Organization

Technical Assistance Support

One-on-one Technical Assistance is Available to All Prospective Applicants!

Get Technical Assistance:

- Email
- Phone Calls
- CMO Office Hours
- Regional Information Sessions

Get Help With:

- Understanding Eligibility
- Budget Advice
- Project Design
- Developing Partnerships
- And more!

Technical Assistance is NOT:

- Filling out Application
- Writing Budget

Technical Assistance Support

- Complete online form at cleanmobilityoptions.org/help/

- Call into CMO Hotline **626-744-5670**

- Access one on one assistance: info@cleanmobilityoptions.org

- CMO Regional Information Sessions: We travel to your community info@cleanmobilityoptions.org

- CMO Thursday Office Hours: 12pm- 1pm PT weekly- ZOOM

Join Us for Upcoming Webinars

❖ MPV Application Part-One Walkthrough - **September 28, 2022**

❖ MPV Application Part-One Walkthrough-Tribal Communities- **September 29, 2022**

❖ Setting CMO Applicant Expectations - **October 19, 2022**

❖ Benefits of Mobility Provider for MPV - **Dates coming soon**

❖ *MPV Application Part-Two Walkthrough* - **Dates coming soon**

❖ *MPV Application Part-Two Walkthrough- Tribal Communities* - **Dates coming soon**

Thank You!