



**Clean
Mobility
Options**

WELCOME

Poll

What type of organization are you representing today?

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

Setting Program Expectations For Community Transportation Needs Assessment (CTNA) Applicants



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October 19, 2022



Introduction



Mateo Henderson
CMO Program Administrator



Joey Juhasz-Lukomski
CMO Program Administrator



Agenda

- **CMO Program Overview**
- **Steps Of CTNA Application & Voucher Agreement Execution**
- **Review Of Insurance Requirements**
- **Voucher Redemption Requirements**
- **Preparing For Project Onboarding**
- **Understanding Project Implementation**
- **Reporting Requirements**
- **Completing Your CTNA**
- **What Is Clean Mobility Equity Alliance (CMEA)**



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Clean Mobility Options (CMO) Voucher Pilot Program Overview

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



Clean Mobility Options Program Goals

- Increase zero-emission mobility choices for all Californians, including disadvantaged communities, low-income communities, and Tribes
- Fund community-driven mobility solutions by centering the residents' primary needs
- Improve access to clean mobility options that are safe, reliable, convenient, and affordable to communities throughout California
- Reduce greenhouse gases and criteria pollutants



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Clean Mobility Options

The Community Transportation Needs Assessment (CTNA) application window is set to open

SAVE THE DATE

9:00 am PT on November 2, 2022

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 Scope of Work:

- Transportation Access Data Analysis:
 - Community Survey
 - At least three data sources
- Community Engagement:
 - Minimum 2 engagement activities
- Final Summary Report



CTNA Voucher Funding

- 12 Month Term
- \$1 Million total available funding
- Up to \$100,000 per CTNA Project
- Minimum of \$200,000 total set-aside for eligible Tribal Government



Technical Assistance Support

Available One-on-One Technical Assistance 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

Technical Assistance is NOT:

- Filling Out Application
- Writing Budget

Technical Assistance Support

- Complete online form at the cleanmobilityoptions.org/help/
- Call into CMO Hotline **626-744-5670**
- Access One-on-One assistance or schedule an in-person Information Session: info@cleanmobilityoptions.org
- Information Session: A scheduled forum to discuss regional projects ideas info@cleanmobilityoptions.org
- CMO Thursday Office Hours: 12pm- 1pm PT weekly- [ZOOM](#)





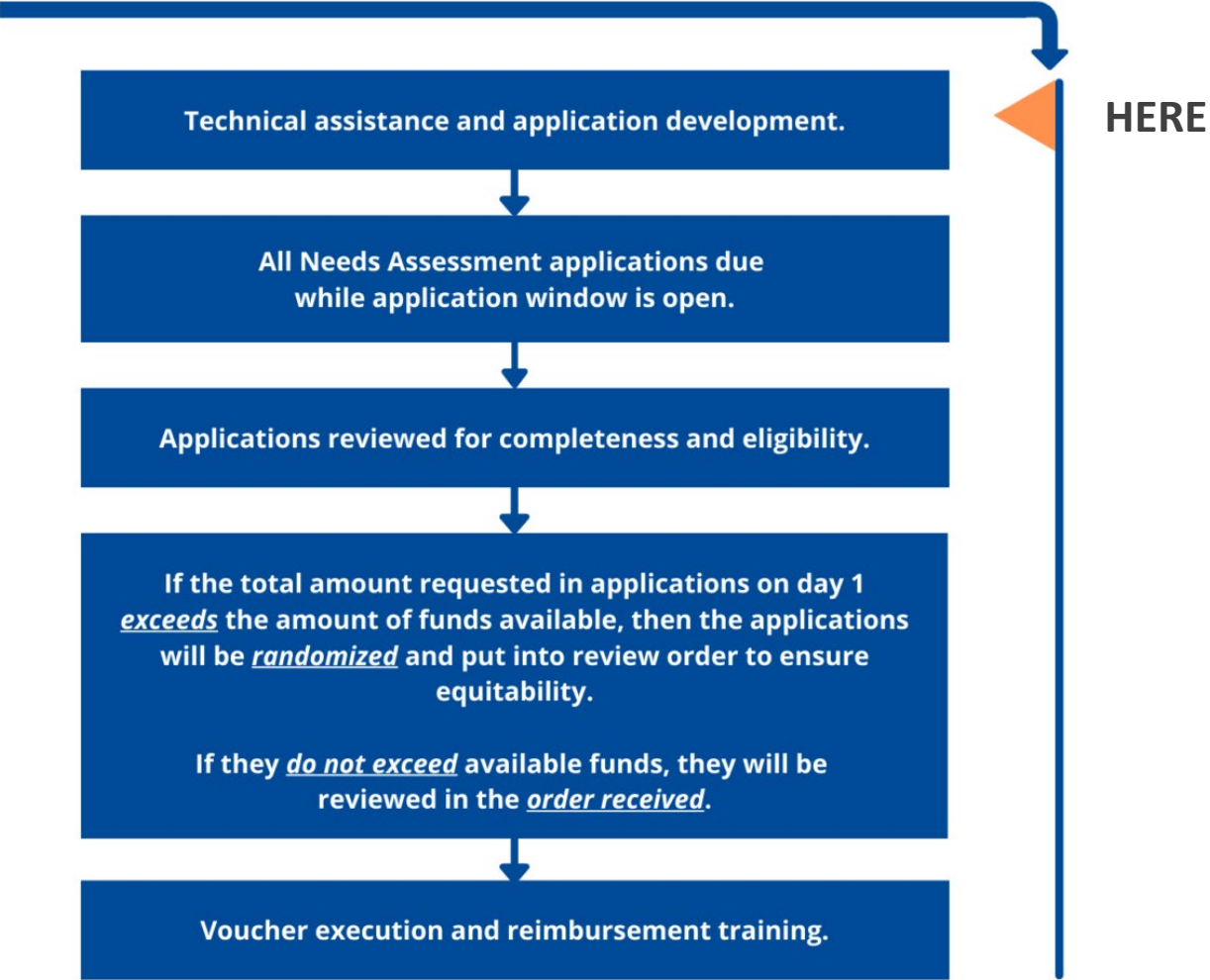
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Steps of CTNA Application

CTNA Application Process

NEEDS ASSESSMENT VOUCHER APPLICATION PROCESS BAR



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



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:

- Application can only be submitted or postmarked on Wednesday, November, 2 2022 at 9am
-



No Incomplete Submissions:

- Submitted applications must be complete with all required documents to be evaluated

CTNA Application Process

Applications are awarded on a First-Come, First-Served basis.

This means applications are reviewed, evaluated and awarded in the order they are received, until funds are exhausted.

Window-Two CTNA Application Process Dates

OPENS: 9:00am Wednesday, November 2, 2022

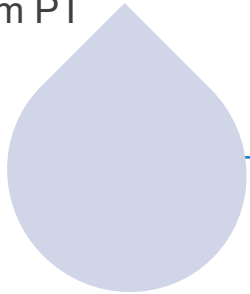
RANDOMIZATION: Wednesday November 9, 2022

CLOSES: Friday, December 7, 2022

Application Review and Awards

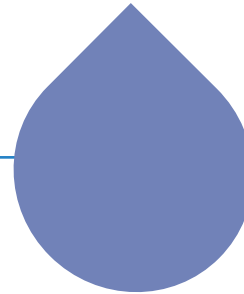
Submission:

- Application Window Opens November 2, 2022, at 9am PT
- Application Window Closes December 7, 2022, at 11:59 pm PT



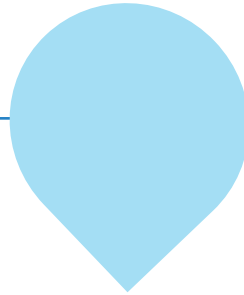
Notification:

- Notice of Intent to Award



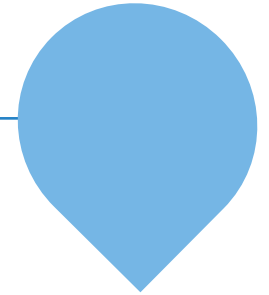
Evaluation:

- Up to 60 days to complete evaluation



Sign & Execute Voucher Agreement:

- 60 calendar days from date of Notice of Intent to Award



Application Review and Awards

1

Review: Administrator begins the review process after receiving your application

2

Grace Period: Eligible Applicants may be asked to provide minor 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



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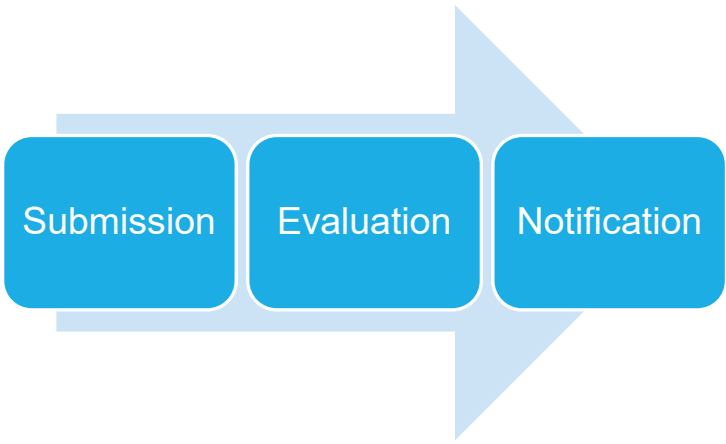


Steps of CTNA Voucher Agreement Execution

Steps Of Application & Voucher Agreement Execution

Application Processing

Applications are submitted, evaluated and Notice of Intent to Award are made



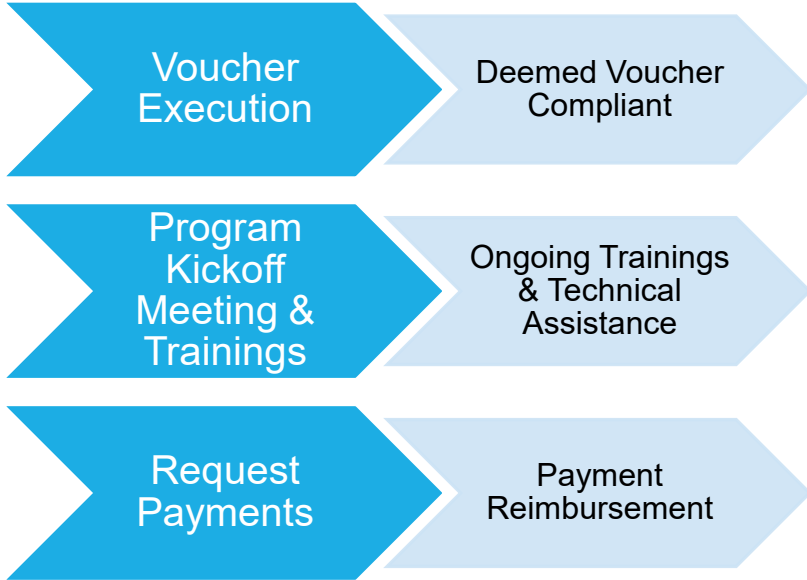
1 month

2 month

3 month

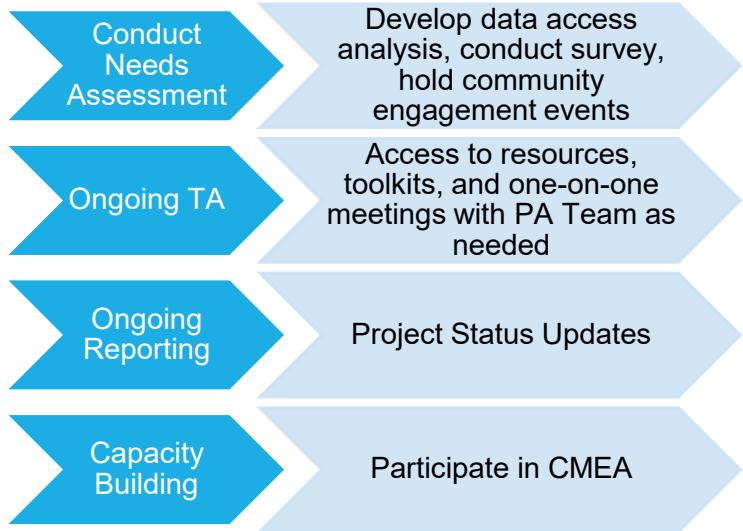
Program Onboarding

Applicants are awarded and prepare for program onboarding



Conduct Needs Assessment

Project Awardees conduct Needs Assessments with support from Administrator



12 months

Needs Assessment Voucher Agreement & Funding Term

Required Supporting Documents for Voucher Agreement Execution

1

Project Milestone Schedule:

- Provides an estimated timeline for the life of the needs assessment project, including all project activities and interim steps needed to implement the project.

2

Approved Resolution:

- Documentation of approval of the project from the governing board that will commit the agency/organization to comply with the requirements of the program.

3

Signed Conflict of Interest Forms & Signed Confidentiality Agreements:

- Required as part of the Voucher Agreement and will be provided to the Awardee by the Program Administrator.

Additional Supporting Documents for Tribal Governments

1 Project Milestone Schedule:

- Provides an estimated timeline for the life of the needs assessment project, including all project activities and interim steps needed to implement the project

2 Approved Resolution:

- Documentation of approval of the project from the tribal council or tribal chairperson before execution of the Voucher Agreement

3 BIA Consent (if applicable):

- Federally Recognized Tribal applicants shall obtain Bureau of Indian Affairs consent to the applicant's execution and recordation

4 Limited Waiver of Sovereign Immunity:

- For applicants that are Federally Recognized Tribes or Federally Recognized Tribal controlled entities

5 Signed Conflict of Interest Forms & Signed Confidentiality Agreements:

- Required as part of the Voucher Agreement and will be provided to the Awardee by the Program Administrator



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Review of Insurance Requirements

CTNA Insurance Requirements

Current insurance coverage for all required insurance types must be demonstrated throughout the voucher agreement term.

- ✓ Endorsements
- ✓ Additional Insured's
- ✓ Required limits

Subcontractors need to be listed as 'additional insured' under your insurance OR supply evidence of the subcontractor's insurance that is equal to policies, coverages and limits required by you.

CTNA Insurance Requirements

Commercial General Liability:

- Awardee shall maintain general liability with limits not less than \$1,000,000 per occurrence for bodily injury and property damage liability combined with a \$2,000,000 annual policy aggregate.

Automobile Liability (if applicable):

- Awardee shall maintain business automobile liability insurance for limits not less than \$1,000,000 combined single limit for all vehicles used in the project.
 - Marketing
 - Survey distribution
 - Outreach and educational activities
 - Driving to events



Insurance Requirements

Workers' Compensation and Employer's Liability:

- Awardee shall maintain statutory worker's compensation and employer's liability coverage for all its employees, students, interns and/or volunteers who will be engaged in the performance of the project
- Employer's liability limits of \$1,000,000 are required

Cyber Liability coverage, with limits not less than \$1,000,000 per occurrence or claim:

- Claims involving infringement of intellectual property but not limited to
 - Copyright
 - Trademark
 - Trade dress
 - Information theft etc.

Non-Profit Organization with 100 percent Volunteers Only (if applicable):

- A Volunteer Accident Insurance Policy with a limit not less than \$1,000,000



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Voucher Redemption Requirements

CMO is a Voucher-Based Program

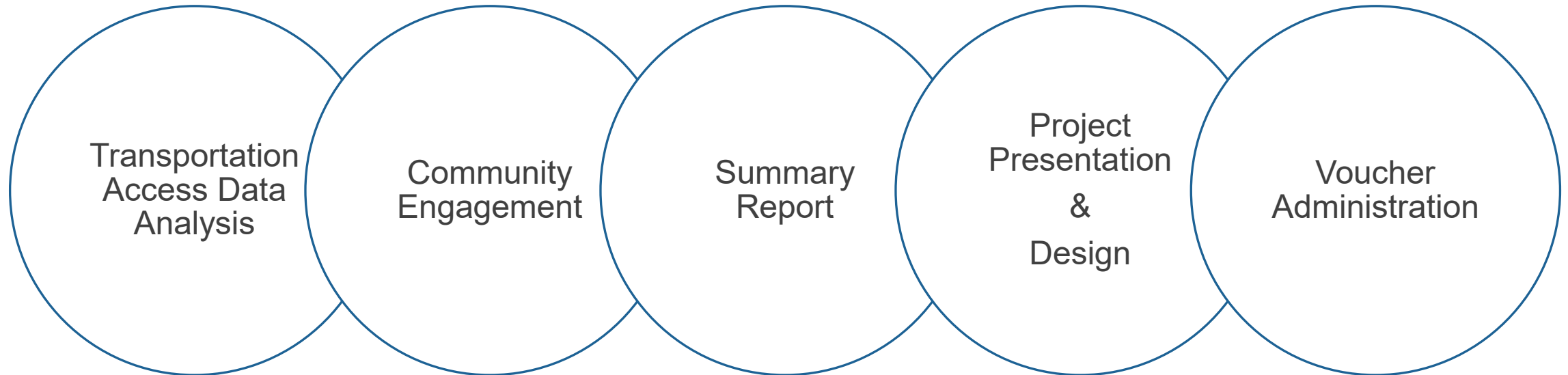
- **Voucher Agreement:**
 - Contract between the CMO Program Administrator and Awardee that serves as “Promise of Payment”

- **Voucher funding can be reimbursed only for approved expenses on a recurring basis upon CMO Program Requirements and after**
 - Voucher Agreement Executed
 - Deemed Insurance Compliant
 - Expenses are Incurred

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



Eligible Cost Covered by CTNA Funds



CTNA Payment Process

Completed Payment Request Form With Proof Of Payment

- Travel Mileage breakdown, Subcontractor Invoices, etc.

Current Project Status Report

- Project Status Report submitted describing milestone achieved that is covered in the Payment Request
- Submitted Bi-Annual Status Report (every 6 months)
- Submit Invoice Narrative form

Submitted Bi-Annual Status

- Submitted Bi-Annual Status Report (every 6 months)

Other Requests For Information, As Applicable

- E.g., Payroll Register, proof of payments, etc.

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 Administration 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:				

Quick Tips

CMO covers many expenses including:

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

Consider all costs:

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

What can't be reimbursed:

- Child Care
- Food Costs

Avoid granularity or being too specific:

- Projects are dynamic



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Preparing For Project Onboarding

Preparing For Project Onboarding Process

What to Expect

- Project Kick-Off Meeting (after Voucher Execution & Insurance Compliance)
 - Awardee can officially start billing for incurred cost
 - Awardee meets with Technical Assistance Team
 - Assigned Cohort Facilitator



Preparing For Project Onboarding Process

What to Expect

- Meet with your **Cohort Facilitator**
 - Your point of contact for Technical Assistance – 1:1 calls, meetings, connect you with technical experts, provide resources
 - Plan for scheduled check-ins, but assistance is available whenever needed
 - At least one site visit





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Understanding Project Implementation

Understanding Project Implementation

12 Months from Voucher Execution to Complete Needs Assessment

Transportation Access Data Analysis:

- **At least three data sources:**
 - Use online sources, local data, previous planning documents to discover barriers, potential needs

Community Survey:

- Ask residents about mobility barriers, needs, concerns – how do these compare to the data sources?
- Ask about vehicle ownership to provide support from purchasing incentives
- Collect at least 100 responses (based on project area populations)



Understanding Project Implementation Continued

Two Community Engagement Activities

- Educational Events about zero-emission transportation options
- One should include reporting back and discussion of possible shared mobility solutions

Summary Report

- Synthesize data, community feedback
- Propose shared mobility projects, other mobility solutions
- Share, and report back to community and other stakeholders

Project Design (optional)

- See [Needs Assessment Implementation Toolkit](#) for resources
- And Window-One CTNA [Closeout Event recording](#) for Inspiration





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Reporting Requirements

Reporting Requirements

Awardees must complete and submit at least one bi-annual status report every six-months during the Voucher Agreement Term.

6-Month Status Report

- Job Creation Data
- Community Engagement Reporting
- Milestone Update

Reporting Requirements Continued

Final Summary Report- received by Program Administrator within 30 calendar days before voucher agreement end date, with other reports due at the end of the voucher agreement end date

Summary Report

- Synthesize data, community feedback
- Propose shared mobility projects, other mobility solutions
- Share, and report back to community and other stakeholders

Other Reports:

- Resident Survey data
- Job Creation data
- Community Engagement and Outreach
- Program Satisfaction Survey
- Gift Incentive Distribution Log



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Completing Your CTNA

Clarifying Project Closeout

Final Payment Request:

- Awardees must make their final payment request within 30 calendar days after the end of the Voucher Agreement Term.
 - Extensions may be requested
- Any unrequested funds remaining at that time will expire.
- Voucher funds that are not redeemed their respective expiration deadlines will be considered expired and funds will be reassigned at CARB's discretion

Additional Closeout:

- Attend CTNA Closeout Event



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What Is The Clean Mobility Equity Alliance (CMEA)?

What Is The Clean Mobility Equity Alliance (CMEA)?

What is CMEA?

- A peer-to-peer community of practice to support project implementation among past & present CMO awardees, awardees of other grants supporting clean mobility (like STEP and CMiS), technical experts, and mobility stakeholders

CMEA goals

- Support Project Implementation
- Create a clean mobility equity community of practice
- Advance mobility justice policy solutions to meet the state's climate, air quality, and equity goals

What Is The Clean Mobility Equity Alliance (CMEA)?

What to Expect:

- Required virtual meetings to connect with other CTNA Awardees and the CMEA network
- Optional virtual or in-person trainings on topics to support CTNA process
- Networking and advocating in a statewide group
- An annual in-person convening of the network

Questions?



Poll

How is your application progressing?

- a) My application is complete
- b) Still working on it
- c) I haven't started
- d) I am unsure about applying

Technical Assistance Support



What is Technical Assistance?

- Technical Assistance available for all prospective applicants and to provide one-on-one support through email communications, phone calls and video calls to support applicants to apply for the program:
 - Includes guidance and answering questions on understanding eligibility and the application, conducting needs assessments, project planning, developing partnerships, etc.
 - Does not include direct assistance in filling out CMO applications, conducting needs assessments, creating budgets, developing contracts, etc.
- Technical Assistance can be accessed through:
 - Complete online form at the cleanmobilityoptions.org/help/
 - Call into CMO Hotline **626-744-5670**
 - Access one on one assistance- info@cleanmobilityoptions.org



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CITY OF CHULA VISTA
ELECTRIC VEHICLE
CAMPING

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ELECTRIC VEHICLE
CAMPING

CIVIC CENTER
PUBLIC

F Street

F Street



Ages 55+ • ADA Accessible • On Demand • Free



UIT



ADA Accessible • On Demand • Free



Community SHUTTLE

ADA Accessible • On Demand • Free

ONLY LEFT LANE

Thank You!



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