

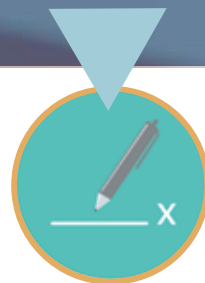
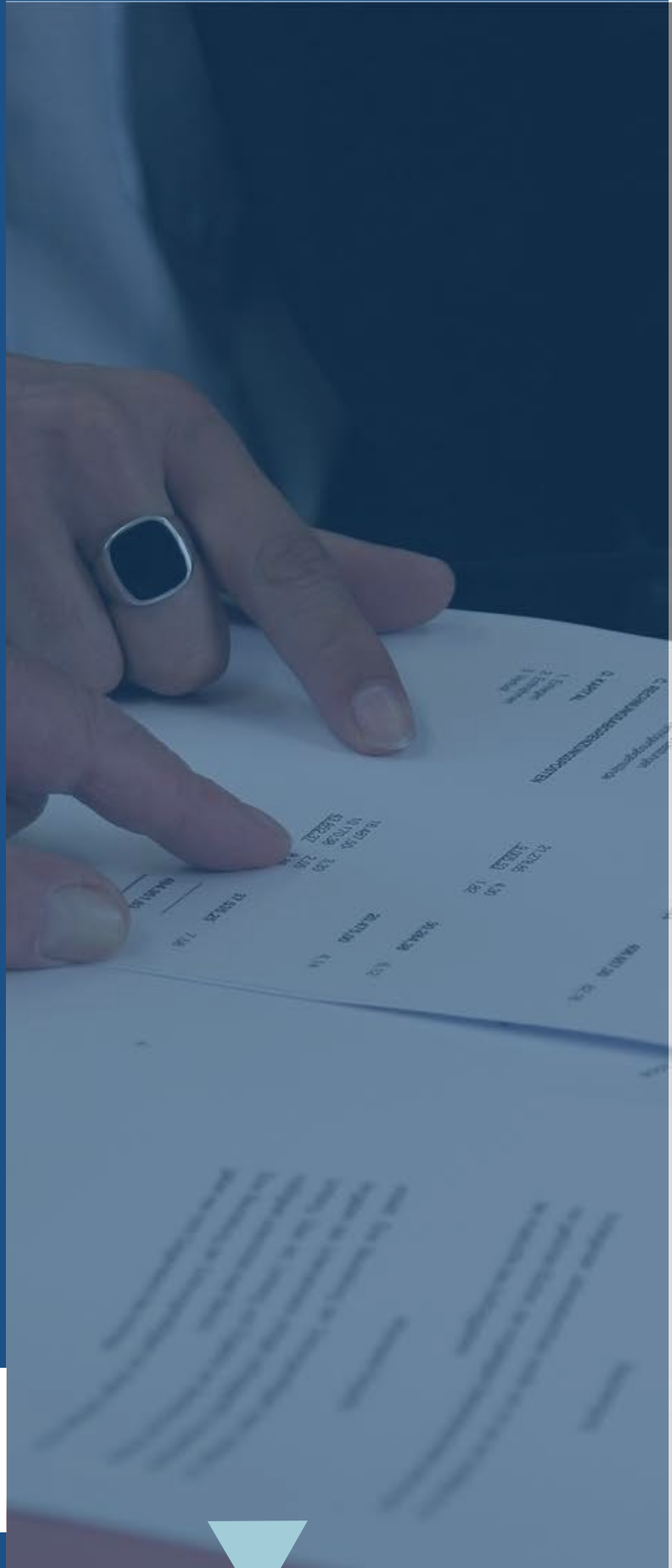


FINALIZE CONTRACTS AND PROCUREMENT

Strategies and Considerations for Setting up Contracts for Your Mobility Project

August 2022

*Project Implementation Toolkit
Guide 4 of 5*



Finalize Contracts & Procurement

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WHAT IS CMO?



The Clean Mobility Options Voucher Pilot Program (CMO) is part of the [California Climate Investments \(CCI\)](#), a statewide initiative that puts billions of Cap-and-Trade dollars towards reducing greenhouse gas emissions, strengthening the economy, and improving public health and the environment — particularly in disadvantaged communities.

CMO provides voucher-based funding for zero-emission carsharing, carpooling/vanpooling, bikesharing/scooter-sharing, fixed-route transit services, and ride-on-demand services in California's historically underserved communities. CMO also aims to improve underserved communities' access to clean mobility options and seeks to further mobility equity.



Fresno Metro Ministry demos the Arcimoto FUV at Manchester Center during a shared mobility event. This event was part of the Fresno Metro Ministry Southern Blackstone Transportation Needs Assessment Project.

This program is co-funded by the 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.

WHAT IS THE PROJECT IMPLEMENTATION TOOLKIT?

The Project Implementation Toolkit is a suite of five guides designed to help each of the awardees implement their mobility project well. Each Guide in the Toolkit has been designed as a stand-alone resource with tips and worksheets.



Guide 1: Calculate Costs

This guide includes information about budgeting throughout the Planning & Construction Phase and the Operation Phase of your mobility project. Special considerations and notes are included for bikeshare, carshare, carpool/vanpool, innovative transit services, and ride on demand.



Guide 2: Hire Locally

This guide includes information about hiring positions, budgeting, and strategies to create a team for your mobility project.



Guide 3: Engage the Community

This guide includes information about fostering project identity, addressing institutional inequalities, building capacity with residents, creating community buy-in, and developing sustainable ridership.



Guide 4: Finalize Contracts & Procurement

This guide includes information about procuring new mobility service operators, construction and maintenance services, project management services, or any other necessary contractors.



Guide 5: Plan the Site

This guide includes information to help you in planning the location of zero-emission vehicle or micromobility options stations and charging infrastructure, navigate the municipal permitting processes, check insurance requirements, and establish partnerships.

ABOUT THIS GUIDE

The [Implementation Manual \(IM\)](#) contains important guidelines and eligibility requirements for Mobility Project Voucher awardees, and awardees must conform to standards set in the IM. It is important to review the IM because in some cases, program eligibility is contingent on conforming to these standards.¹

The standards and requirements outlined in the IM may ultimately require developing contracts with other entities. This Guide includes information and considerations about procuring new mobility service operators, construction and maintenance services, project management services, or any other necessary contractors. All Mobility Project Voucher (MPV) awardees are encouraged to seek legal counsel when drafting their own contracts with mobility providers and other ancillary services. Lead Applicants (Awardees) are responsible for all contractor activities, including the activities of subcontractors.

WHAT IS THE GOAL?

The end goal of this guide is to provide awardees with information, tips, and worksheets to establish contracts and procurements that support good partnerships and help meet the mobility project's goals.

¹ Awardees should note that they will be held to the guidelines of the IM in place at the time of application submission. The IM may be updated several times per year to accommodate operational process changes and thus change eligibility requirements. Awardees would refer to the most updated version of the IM found [here](#).

How to Navigate this Guide

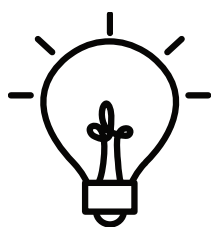
The following sections in the guide are organized in a series of sequential steps to build out your mobility project budget. We suggest that you read each section and complete worksheets in sequence.

- Step 1 is to Learn Contracting Basics
- Step 2 is to Identify Potential Services to be Contracted
- Step 3 is to Select Your Partners and Develop Stakeholder Agreements
- Step 4 is to Understand The Types of Agreements
- Step 5 is to Finalize Contracts For Your Mobility Project
- Step 6 is to Move to the Next Guide in the Toolkit - Plan the Site

Considerations

This document is not a substitute for legal advice or contract sampling.

Reference in this document to any specific manufacture, trade, company name, or service is for informational purposes only, and does not constitute endorsement, recommendation, or favoring by the California Air Resources Board (CARB). Calculate Costs summarizes relevant budget items for each eligible project mode as it draws from mode-specific pilot project examples.






TIP!

Need More Guidance to Contracting and Procurement?

For any questions or for further guidance, CMO awardees are encouraged to contact their Cohort Facilitator.

For prospective CMO awardees, please contact the CMO Administrator Team to receive one-on-one technical assistance.

 CMO Hotline: 626-744-5670
Monday -Friday : 9AM - 5PM PST

 info@cleanmobilityoptions.org
 www.cleanmobilityoptions.org

LEARN CONTRACTING BASICS

Pre-Contracting Considerations

Building relationships with community partners, operators, companies or institutions is essential to identifying who may be good partners for your project. Before engaging in this relationship-building, clearly identify internal budget, staff needs, and other obstacles so that you will be prepared to communicate your team's limitations and constraints with potential partners. The "Calculate Costs" and "Hire Locally" Toolkit Guides have resources to help identify these needs for your Mobility Project.



TIP!

Be sure to include the cost of seeking and using legal partners when establishing a budget

Worksheet

A checklist of considerations has been developed to help make note of the type of line items to include in your future contracts. See if there are any line items that you need to add to your contracts or discuss with your Mobility Project Team.

- The number of vehicles or services provided.
- The project area of those services with language to address the possibility of scaling (if applicable).
- The availability of those services, with language about the hours of operation, headways, or number of vehicles.
- Employment details with language about the number of employees and who their employment is contracted with.
- Mobility Project timeline with language about the duration of the Mobility Project.
- For any reporting, the type of metrics, data, frequency of reporting, and the roles and responsibilities of each group that is involved.
- Expectations around data collection, data standards, and data sharing.

Lessons Learned in Forming Successful Partnerships

Learning from other awardees is critical to the success of pilot projects. In addition to the information below, reach out to your cohort members and your Cohort Facilitator to help connect you with current and past awardees to help understand the challenges and effective strategies in forming successful partnerships. The Program Administrator reached out to a couple previous awardees to provide some real world examples. Their advice? Focus on the details, build a strong, healthy relationship and always have a contingency plan. We expand on focusing on the details and having a contingency plan below.

Focus on Details

According to one awardee,² working with a mobility provider who was “an excellent partner from the beginning” meant 9 months of steady progress towards signing a contract. This long period wasn’t due to obstruction by either side, but instead came from carefully negotiating every possible detail for all likely scenarios. This process began with the government agency describing what they wanted the program to be while listening to what the mobility operator was able to provide. At every point during this 9-month period, having a healthy relationship was key.

² The Sacramento Metropolitan Air Quality Management District administers a car sharing pilot program available to low-income Sacramento residents.

Have a Contingency Plan

Another awardee³ learned an important lesson about defining the scope of a program. Despite using a single contractor for all operations and subcontracting, the scope of the agency's project evolved over time. This transformation caused problems with the relationship between the public agency and its private contractor, and the agency was forced to find a new group to take on these responsibilities. Specifically, the contractor was initially asked to manage all of the vehicles, but this scope expanded over time to include acquiring and insuring the vehicles to the contractor's name. Because this changing scope grew outside the initial agreement between the agency and the contractor, the contractor wanted to renegotiate the terms given the new scope. This meant that the agency was forced to find a new contractor to handle vehicle acquisition and insurance.

There were multiple lessons learned from this experience. Not only did future negotiations involve increased attention to detail, but the agency knew that any future contracts would need to include a Plan B. The change in roles between contractors involved months of paperwork, including the transferal of assets. This included vehicles, insurance contracts, and charging infrastructure. The agency later reflected that contingencies should be designed to predict everything that could go wrong. With that in mind, milestones should be agreed upon by both parties to ensure progress is tangible and easily monitored.

³ The San Joaquin Valley Air Pollution Control District was awarded \$2.5 million for a pilot project, Ecosystem of Shared Mobility, to provide residents with new modes of transportation while reducing air pollution and GHGs emissions.

IDENTIFY POTENTIAL SERVICES TO BE CONTRACTED

This section focuses on different types of services that you might expect to contract for your Mobility Project, as well as some key considerations for each service.

Mobility Operators

Mobility operators are entities that lead the development and implementation of systems for operating a mobility service. This includes activities such as 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 provisions. The [Clean Mobility Provider Directory](#) has been developed to help Lead Applicants (Awardees) identify mobility operators and other relevant contractors for their project. This can be the Lead Applicant (Awardee) if the organization meets the minimum qualifications of an “experienced partner” as defined in the IM.⁴ If not, Lead Applicants (Awardees) must include an “experienced partner” as part of the project team. Lead Applicants (Awardees) are responsible for the activities of all sub-applicants and subcontractors.

⁴ Each Mobility Project Voucher team must include an organization with at least one year of experience operating mobility services. The “experienced partner” may be the entity that operates the proposed service, or it may serve in another capacity such as a project technical advisor.

Site Agreements

Site requirements for new mobility services vary greatly by transportation mode. Some modes may involve private contracts with landowners, often called Site Host Agreements. For example, services like bikeshare and carshare may require publicly-accessible space for vehicle parking, storage, or charging. This could involve contracting space from existing, privately-owned land. On-Demand services such as innovative transit don't have the same requirements, but they may still need to procure space for charging or overnight vehicle storage.

For more details on site planning, including navigating the relevant permit requirements, please see Guide 5 - Plan the Site.

Local Construction Contracts

If your project requires construction, here are some considerations when hiring locally for construction contractor positions:

Find local construction/electrician unions that are close to your project area. Please see some of the resources listed below to get started on finding a local group or a specific contractor in your region.

- [International Brotherhood of Electrical Workers](#)
- [Electrical Workers Minority Caucus](#)
- [National Electrical Contractors Association - Directories](#)
- [Contractors State License Board](#)
- [Department of Industrial Relations - Certified Electrician and Electrician Trainee List](#)

To hire locally, work with local unions to obtain a list of qualified candidates within or near the project area. Mobility Projects funded by the CMO program require:

- All electric vehicle charging infrastructure and equipment located on the customer side of the electrical meter must be installed by a contractor with the appropriate license classification, as determined by the Contractors' State License Board, and at least one electrician on each crew, at any given time, holds an Electric Vehicle Infrastructure Training Program (EVITP) certification.
- Projects that include installation of a charging port supplying 25 kilowatts or more to a vehicle must have at least 25% of the total electricians working on the crew for the project, at any given time, who hold EVITP certification.
- Projects that include installation of a charging port supplying less than 25 kilowatts to a vehicle must have at least one electrician working on the crew for the project, at any given time, who hold EVITP certification.
- One member of each crew must be both the contractor and an EVITP certified electrician.

Worksheet

Here is a list of potential services that will require contracts. Review the list and consider if there is or will be a need for a contract with any of the following individuals or groups.

- Mobility Operator
- Software Providers
- Vehicle Suppliers
- Infrastructure Suppliers
- Landlords for Site Agreements
- Construction Services
- Mobility Project Staff Positions
 - Full-Time
 - Part-Time
 - Volunteer
 - Independent Contractors
 - Stipend-Paid

SELECT YOUR PARTNERS & DEVELOP STAKEHOLDER AGREEMENTS

Part of the mobility operator selection process and contract negotiations are to design and establish equitable stakeholder agreements amongst all parties involved. Some important aspects of stakeholder agreements include data sharing and reporting, insurance indemnification, approved contractors, agreements about the costs associated with permitting and exclusivity to operate, and confidentiality agreements.⁵ Additional coordination with legal and finance professionals may be needed in some cases.

Before launching, programs should coordinate with legal and finance professionals - To ensure agreements are sound, you may need to work with professionals outside of your organization and industry to develop contracts and agreements.

Procurement Process

In addition to contractual agreements with partners, procurement strategies should be reviewed with them as well. There are requirements for the CMO program that must be met regarding certain purchases. These requirements include ensuring services and vehicles funded by CMO be maintained throughout the Voucher Agreement Term, telematics devices be installed on all devices used, alternative payment options must be available and certified EVITP electricians are included in the installation team for infrastructure and more. For a full list of these requirements see

⁵ The CMO program requires all partners and individuals participating in the CMO program to sign a provided Confidentiality Agreement that will be provided to the Lead Applicant (Awardee).

[Implementation Manual Terms and Conditions](#). Remember, sub-applicants and contractors may be eligible for direct reimbursement so this should be explored during procurement considerations to limit out of pocket burdens on the Lead Applicant (Awardee).

Reimbursements/Payments

All voucher payments are reimbursed. Sub-applicants and contractors may be eligible for direct reimbursement. To be eligible for direct payment these groups must be established as a “Registered Vendor” and approved by the Program Administrator prior to the submission of direct payment requests. To qualify as a Registered Vendor, the vendor must be an incorporated business in good standing with the California Secretary of State, nominated by the Awardee and approved by the Program Administrator prior to making the payment request. To assign payment to a Registered Vendor, the Awardee must submit a Payment Assignment form signed by both the Awardee and Registered Vendor.

Reporting Requirements

Data reporting is important for adhering to the evaluation requirements of the CMO Mobility Project Voucher. Data reporting requirements for CMO voucher recipients are found in [Appendix F of the Implementation Manual](#). Awardees must provide information to program administrators on a regular basis to receive reimbursements.

From the IM, Project Status reports must include the following:

- Description of progress, expected (or past due) launch date, delays, deviations from community outreach plan
- Documentation of Resource Contributions
- Data collected on vehicles, equipment, travel activity, outreach, and job creation (**IM Appendix F**, “Data Collection Requirements”)

A complete list of all data reporting requirements for CMO voucher recipients is found [here](#). These include (but are not limited to):

- Final report (“must be received by the Program Administrator within 30 days of voucher agreement end date, or 30 days prior to project completion date, whichever comes first.)
- Required Datasets (**IM Appendix F**)
- Vehicle and Charging/Fueling Equipment Specifications
- Bicycle/Scooter and Charging Equipment Specifications
- User Surveys
- GHG Emission Reduction Inputs

UNDERSTAND COMMON TYPES OF AGREEMENTS IN MOBILITY CONTRACTS

When developing contracts, additional agreements may be required. Data sharing and sponsorship agreements are outlined below, additional agreements may be required and should be identified prior to signing a final contract.

Sponsorship Agreements

Sometimes additional funding may be needed to support costs associated with launch and operations. Therefore, sponsorship agreements with local or national businesses may be a viable solution.

Depending on the nature and scope of the mobility project, there may be opportunities for sponsors to pay to have their brand on assets such as ad panels, vehicles or kiosks. Any sponsorship agreements would need to be incorporated into a modified stakeholder agreement with the Lead Applicant (Awardee), mobility operator, municipality and third party property owners.

Leveraging community resource contributions and in-kind donations, sponsorship can come in a variety of forms such as cross-promotional materials and events with local area non-profits and transit agencies. The sponsorship can also supplement costs associated with outreach and community engagement budgets.

Data-Sharing Agreements

As data reporting is critical to fulfilling the voucher agreement, it is recommended to incorporate data sharing agreements into any contract with a subcontractor who will be collecting, analyzing, owning/holding, and handling data on behalf of the team. The Lead Applicant (Awardee) is responsible for complying with all data requirements outlined in the IM, and thereby responsible for all subcontractor's data collection activities. It is the Lead Applicant (Awardee)'s responsibility to collect and submit all required data from their subcontractors.

During the solicitation or request for proposals (RFP) process to find subcontractors, consider incorporating the following data-sharing components in contracts and service agreements that collect and analyze data relevant to the operations and equity consideration of your project.

- 1** Review the parameters, required data points, and data reporting dates. Data reporting requirements for CMO voucher recipients are found [here](#). Data reporting for CMO occurs on a quarterly basis. Data reporting should accompany the Project Status Reports.
- 2** Identify how data will be collected (it is required, where possible, to collect vehicle data through telematics). The reporting requirements as described in the IM should be followed for all data reports to CMO.
- 3** Consider the potential to embed surveys into user interfaces. Surveys are required to be distributed on an annual basis to assess user behaviors and obtain a clear understanding of how the fleet is used in the field. Explore if embedding into user interfaces is an option for a provider to determine the cost or needs associated with this program requirement.

- 4 Check with local partners about data reporting needs. Data sharing can help support a successful program and prepare for reporting. It would be a good practice to establish any other needs or uses of the data the Lead Applicant (Awardee) would wish to use the data for and incorporate that into the agreement upfront.
- 5 Build accountability practices and contingencies into data sharing agreements in the event the subcontractor does not comply with program requirements. As referenced above, it is the Lead Applicant (Awardee)'s responsibility to ensure all requirements of the program are met. Beyond contingencies, it is recommended to (1) establish a clear data reporting process to maintain relationships of trust between all parties involved, (2) convey data needs and requests for transparency early on in the process between the Lead Applicant (Awardee) and Mobility Operator, and (3) engage with municipal and public agency partners early-on to streamline data requests, points of contact and data reporting structure.
- 6 Meet Data Specification Standards. Successful programs use these broader standards, such as the General Bikeshare Feed Specification (GBFS) or the General Transit Feed Specification (GTFS) to their advantage. Due to their established uniformity, these standards help operators communicate with more than one municipality or governing body using the same data reporting. These agreements should cover future scaling possibilities, user privacy, and cohesion with other programs. Agreements should also specify that the Lead Applicants (Awardees), transit agencies, or municipalities can request telematics data directly from the operators. From the Shared-Use Mobility Center, [this guide on data specifications](#) and its role helps illustrate the importance of these data standards.
- 7 Explore open data sharing. Enable application programming interface (API) for user-facing apps. For example, the app Transit can collect departure information or trip matching information (for microtransit), to help streamline the collection process for easier data reporting.

Indemnity Agreements

An indemnity agreement allows for extra protection against loss, damage, or legal action from third parties, and it may be necessary to provide such an agreement for a mobility project. For example, if a user gets into an accident, an indemnity agreement will generally protect the mobility project from any lawsuits, damages, or claims from third parties. Attorneys' fees, court costs, intellectual property claims, and other costs associated with litigation can end up being a major financial burden for a mobility project, and a well-written indemnity agreement can offer some additional protection.

Service-level Agreements

Service-level agreements dictate the details of specific aspects of the service being provided. For a mobility project, this might include definitions of services, standards for responsiveness, availability, or quality of service, and metrics for measuring those aspects. Though these agreements require effort to manage and monitor, they can be a helpful tool for the mobility project to describe and establish specific aspects of the project and evaluate the progress and provisions of its vendors.

End-user Agreements

It may be important to develop an end-user agreement to cover the final customer's interaction with the mobility project's services. These agreements allow for the use of the mobility service while dictating how it can be used and detailing restrictions and limitations. These agreements

are necessary to protect the rights of the mobility project by describing the terms of the service and setting the expectations of the user.

Worksheet

It is important to have a road map to help anticipate contractual and agreement needs for the short term, medium term, and long term of your mobility project. Here is some note taking space to help you organize the type of contracts or agreements you expect over the course of your mobility project.

Year 0-1: Planning & Construction Phase

During this phase, the Mobility Project Team plans to have contracts or agreements with (use the check box to indicate which agreements or contracts need to be established):

- Sponsorship Agreement
- Data-Sharing Agreement
- Indemnification Agreement
- User Agreement
- Service Level Agreements
- Mobility Operator Contract
- Software Providers Contract
- Vehicle Suppliers Contract
- Infrastructure Suppliers Contract
- Landlords for Site Agreements Contract
- Construction Staff Positions Contract
- Mobility Project Staff Positions Contract

The Mobility Project Team has:

- Included the development period for the agreements in the project schedule.
- Budgeted for the time and labor required for developing and finalizing the agreements.
- A buffer has been established in the projected schedule and agreements to anticipate delays to finalizing contracts or agreements.

During this phase, the Mobility Project Team plans to have contracts or agreements with (use the check box to indicate which agreements or contracts need to be established):

<input type="checkbox"/>	Sponsorship Agreement
<input type="checkbox"/>	Data-Sharing Agreement
<input type="checkbox"/>	Indemnification Agreement
<input type="checkbox"/>	User Agreement
<input type="checkbox"/>	Service Level Agreements
<input type="checkbox"/>	Mobility Operator Contract
<input type="checkbox"/>	Software Providers Contract
<input type="checkbox"/>	Vehicle Suppliers Contract
<input type="checkbox"/>	Infrastructure Suppliers Contract
<input type="checkbox"/>	Landlords for Site Agreements Contract
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FINALIZING CONTRACTS FOR YOUR MOBILITY PROJECT

Once you have been awarded funds for your Mobility Project, and the voucher is executed, you will need to finalize agreements and contracts with your subcontractors. Here are a few key considerations for finalizing these contracts.

The Mobility Project's timeline should be accurately reflected in contracts

The Mobility Project Vouchers issued by CMO are based on a multi-year model, as illustrated in the below graphic (**from the IM**). The Voucher Agreement Term and the Voucher Funding Term for Mobility Project Vouchers are defined as following: a. Voucher Agreement Term is minimum 5 years from the date Voucher Agreement is executed. This includes up to 15 months for project design, planning and construction (Planning and Construction Period), and minimum of 4 years of service operation (Project Operation Period).

Note that the Voucher Agreement Term lasts 5 years from the execution date. This means that programs are required to operate for a full year after CMO funding ends. For this year ("Year 4 of service operation" in the chart below), only administrative costs are reimbursable through CMO sources, not operations costs. When developing a contract, it is recommended to explore contractual contingencies in the event that a mobility operator or other contractor moves to terminate an agreement after the CMO-funded

period. Lead Applicants (Awardees) are encouraged to use the first 3 years of service operation to secure other funding opportunities to continue operations beyond the CMO-funded period.

Voucher Agreement Term								
Voucher Agreement Execution	Project Kick-off Meeting	Up to 15 months for Planning & Construction Period	Operation Launch Date*	Year 1 of service operation	Year 2 of service operation	Year 3 of service operation	Year 4 of service operation	
				All eligible costs incurred during this time can be reimbursed by CMO Voucher (Planning and Construction Period + first 3 years of Project Operation Period)				Project Operation Period (minimum of 4 years)
	During this time and until the end of Voucher Agreement term only administrative costs are reimbursable							
	Data Reporting Period (minimum of 5 years)							
*Operation Launch may begin at any time during the first year of the Voucher Agreement period but must occur no later than 15 months <u>from the date of project kick-off meeting.</u>								

Figure 1: Mobility Project Voucher Agreement Timeline

Maintaining financial sustainability over the life of the voucher agreement can be challenging. Establishing clear duties and responsibility for funding and financing is also recommended to be agreed upon prior to entering into a contract. For more guidance on costing out mobility programs within the constraints of the Mobility Project Voucher, CMO has provided a [Guide to Calculate Costs](#) to manage budgeting expectations across the different relevant project modes. In general, awardees should seek funding sources in addition to service fares to support the last 2 years of the voucher agreement term. The Shared-Use Mobility Center has also published a more general learning module on [Shared Mobility Funding Strategies](#) that can provide broad guidance.

Understand Which Capital Costs Are Reimbursable

When negotiating a contract, ensure awareness on all sides that there are maximum allowable costs for vehicles and infrastructure. The full list of maximum reimbursements for all available vehicle types and charging/fueling infrastructure can be found here ([full list](#)). Purchase or development of software for reservation and payment of the mobility service also qualifies as a capital cost. In addition to vehicles and infrastructure, the IM also [defines](#) warranties, repair labor, helmets for bicycle/scooter services and parking spaces as eligible capital expenses. Please see the [Calculate Costs Guide](#) for more details.

Understand Maximum Reimbursable Costs

The IM also outlines the maximum reimbursable amount for certain capital costs. When negotiating a contract, ensure awareness on all sides that there are maximum reimbursement costs associated with the CMO Program. Subcontractors can submit their own reimbursement requests directly to CALSTART, which reduces payment request timing and improves cash flow for Lead Applicants (Awardees).

Confirm Availability of Required Documentation for Reimbursement

In many cases, supporting documents are required for each reimbursement, [with the full list available in the IM](#). Some of these supporting documents include:

Proof of costs incurred for vehicles, infrastructure, and other approved costs.

- These can include contractors/subcontractors, staff labor, and other fees associated with the new program. Please note that the IM includes a detailed list of eligibility requirements for CMO vehicles as well as eligibility and required documents for approved infrastructure.

Solar Photovoltaic (PV) Infrastructure documentation (in addition to previously described infrastructure documents).

- [From the IM](#), these include: “A copy of the official Permission to Operate (PTO) notification from the local electric utility, AND a signed compliance affidavit that the solar PV system complies with all program regulations or, Alternatively, if the solar PV system is receiving funding from the Solar on Multifamily Affordable Housing (SOMAH) Program, a copy of the submitted SOMAH Incentive Claim Form (ICF-V1-2019) along with all required attachments and affidavits.”
- Please note that separate from CARB, the State of California provides guidelines for solar contractors through its C-46 License. These guidelines are available in [this study guide](#) for C-46 license applicants.

Status reports and supplemental documents (as required).

- These must be kept up to date in order for programs to receive reimbursements. This includes timely submission of quarterly project status reports, responses to any outstanding survey information or responses to special requests for information by the Program Administrator or CARB, and/or other documents as required. Awardees must complete and submit a project status report at least on a quarterly basis, including contents described in [the IM Section N](#).

Other potentially required documents for reimbursement

- This could include site locations or site agreements, community input on services and infrastructure from outside the planned service area, insurance information for vehicles and equipment, along with additional documents requested from service providers by local Project Administrators.

NEXT STEPS: MOVE TO THE NEXT GUIDE

Congratulations on building out contracts and finalizing stakeholder agreements for your mobility project! The next guide in the Toolkit is the Plan the Site guide. Use this guide to get ideas on how to navigate the permitting process.



1. Calculate Costs



2. Hire Locally



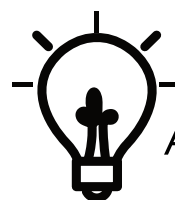
3. Engage the Community



4. Finalize Contracts & Procurement



5. Plan the Site



Additional Support

For any questions or for further guidance, please contact your Technical Assistance Leader.



CMO Hotline:
626-744-5670
M-F | 9AM- 5PM PST



info@cleanmobilityoptions.org



www.cleanmobilityoptions.org

ADDITIONAL RESOURCES

The Institute for Public Procurement (NIGP) hosts a [Best Practices Resource Hub](#), which may be relevant to program admin needs. Specific modules of interest include:

- [Best Practices on Specifications](#)
- [Best Practices on Technology to Aid in Procurement](#)
- [Best Practices on Contract Administration](#)

Other Legal Resources (from [americanbar.org](#)) which may provide practical value:

- [Sustainable Economies Law Center](#)
 - From the American Bar Association: “The SELC has two complementary programs aimed at increasing access to transactional legal services for low-income entrepreneurs and change-making organizations, such as worker cooperatives, nonprofits and urban farms.”
 - communications@theSELC.org
 - 510-398-6219
- [The Online Self-Help Center: Judicial Council of California](#)
 - Court-sponsored online database for self-help.
 - Also directs users to other [free and low-cost legal resources in California](#).
- [Lawguru.com](#)
 - Free interface to submit legal questions to attorneys. Also includes a database with hundreds of thousands of attorney-provided answers.
- DWF (Legal Consultant)
 - [“Procuring Bikesharing Schemes Without Reinventing the Wheel”](#)