Clean Mobility Options Voucher Pilot Program
Instructions for the 2022 Mobility Project Voucher Application

This document provides instructions for using the Clean Mobility Options Voucher Pilot Program's (CMO) online application for Mobility Project Voucher (MPV) funding. The application is based on the Implementation Manual (IM), which has been updated for 2022. To learn more about CMO, including opportunities for separate funding for Community Transportation Needs Assessments, please visit www.cleanmobilityoptions.org.

The instructions in this document provide links to key sections in the IM, which provides the full scope of detailed application and program requirements. Applicants must review and understand the IM itself and attest that they have done so.

Applicants using the online application form will respond to a combination of question types including multiple choice, fill-in-the-blank, and upload fields. The application provides multiple-choice format when possible. When multiple-choice options are given, all options are eligible provided that the responses individually and the application as a whole are true, accurate, complete, and will be supported by evidence upon request. The application form is intended to be accessible and usable on a mobile device.

Text in red refers to questions or groups of questions that only appear based on Applicant's responses to certain previous questions.

BEFORE YOU BEGIN

1. Check that your organization is eligible.
The types of organizations that are eligible to submit applications as Lead Applicants are Federal, State, or local government agencies based in California, nonprofit organizations, and tribal governments. Other types of organizations may participate as Sub-Applicants and partners. This is not the full scope of organization eligibility requirements. For all organization eligibility requirements, see IM Section C.

2. Check that your project proposal is eligible.
CMO provides comprehensive funding for a wide variety community-based mobility projects that meet certain qualifications. This is not the full scope of proposal eligibility requirements. For all proposal eligibility requirements, see IM Sections C, D, E, F, and G.

3. Check that you can comply with general provisions.
Organizations that apply for CMO funding must be ready and willing to comply with the program's General Provisions if they are accepted. Applicants are expected to secure clearance from their general counsel or other designated legal advisor before applying if applicable. General provision requirements are found throughout the IM. See Chapter III of the IM for more information.

4. Be prepared to submit a Community Transportation Needs Assessment (CTNA) report findings. Projects proposed in the application must be based on a CTNA using the criteria specified. Applicants will need to submit a summary of their CTNA report findings as well as a copy of the survey used for the Community Needs Assessment. This material is required in order for the application to be accepted.

SECTION 1: PRIMARY CONTACT INFORMATION

Organizations that are applying must designate an individual to be the primary contact who will prepare and complete the application as well as serve as the primary contact for all future voucher agreement and program requirements correspondences.

The primary contact will certify that the application is complete, true, and accurate. We will use the email address of the primary contact to correspond with the organization regarding the application's status.

The application form will generate an email confirmation when an application has been saved or submitted and send to that email address. If the primary contact cannot find their saved application, we can assist to locate it using their contact information.

The primary contact must be authorized by the Lead Applicant's organization to act on behalf of the Lead Applicant in the capacities as described here. If the organization has operations that span beyond California (CA), the primary contact must be employed by its CA-based affiliate. All Applicants must complete this entire section.

In the fields, [Individual's Name], [Title], [Email Address], and [Phone], enter the pertinent information about the individual primary contact. In the [Additional Information], which is optional, please provide any other information that would be helpful for communication and coordination. For example, a secondary means of contact in case the primary contact might be out of office, special accessibility needs, or other correspondence information if relevant. If you do not wish to provide additional information, leave this field blank. This is not the full scope of the application submittal and evaluation process. For the full scope, see IM Section H.

SECTION 2: APPLICANT AND TEAM PROFILE

This section addresses information about the application team. This is not the full scope of Applicant and team profile requirements. For the full scope, see IM Section C and H.

The first three sets of question fields, [Lead Applicant Organization Name], [Lead Applicant Organization Address], and [Lead Applicant Organization Type], address basic details about the party leading the application. This party will, if awarded, enter into a legal agreement with the CMO administrator and be legally responsible for project implementation and oversight of the entire project team. The party is referred to as the "Lead Applicant."

In the field, [Indicate Which, if Any, Related CARB Programs the Lead Applicant Has Previously Received Funding For], make the appropriate selection. The answer to this question impacts what further information the Applicant will need to provide.

Applicants who select "CMO Community Transportation Needs Assessment (CTNA) will be prompted to select the name of the project and answer additional questions at the end of Section 1. These Applicants are eligible for set-aside funding for Mobility Project Vouchers for the same project area awarded CTNA funding. The Applicant may direct the administrator to refer to their needs assessment on file and skip Section 4 provided that they are

applying to fund a project that is based on the needs assessment done with funding from a 2020 CTNA voucher and in the same project area.

Applicants who select "CMO Mobility Projects" should provide the name of the project as directed, and must complete section 4.

Applicants who select "CARB Regional Pilot Project" will be prompted to select the name of the project. They may apply for funding for a completely new project, expansion of the current service, or continuation of the existing funded project to support long-term sustainability. These Applicants will be directed to skip Section 4.

Applicants who answer "none" must complete section 4.

The guidance provided here for Applicants that have been previously funded for CMO and Regional Pilot Projects does not reflect the full scope of information available for this part of the application. For the full scope, see IM Section C(4) and Section H.

If the application includes Sub-Applicants, check the box at [Application Includes Sub-Applicants]. If that box is checked, a table with fields for information about the Sub-Applicant(s) will appear. Complete those fields as directed. In the [Role in project] field, summarize how Sub-Applicant(s) will support the effort, such as by operating mobility services, installing equipment, conducting community outreach, or providing other technical expertise/assistance, etc.

Sub-Applicants must be one of the following:
- Nonprofit organization that has Federal 501 tax exempt status, CA state tax exempt status, and registration in active/good standing with the California Secretary of State (SOS);
- Nonprofit organization that has a contract to be fiscally-sponsored by another nonprofit organization who has Federal 501 tax exempt status, CA state tax exempt status, and registration in active/good standing with the California SOS;
- Private organization that is registered with the CA Secretary of State;
- Public agency; or
- Tribally chartered corporation under tribally enacted laws.

Sub-Applicants are not required and there is no minimum or maximum number Sub-Applicants needed for eligibility.

If the Applicant indicates that the organization type of a Sub-Applicant is "incorporated nonprofit organization" or "private organization," the Applicant will be prompted to provide more information. The field, [CA SOS #], refers to California Secretary of State Registration Number, which should be 12 digits. The field, [Fed EIN #], refers to the federal Employer Identification Number from the IRS, which should be 9 digits. Applicants that select "Unincorporated nonprofit" will be prompted with fields for [Fiscal Sponsor Name], Fiscal [Sponsor Fed EIN #], and [Fiscal Sponsor CA SOS #], and should provide the information as directed. This does not reflect the full scope of information available for this section of the application. For the full scope, see IM Section C(2).

In the [Indicate the Lead Applicant's Relationship with the Mobility Provider] field, indicate the relationship as directed. The team must include a mobility provider to lead or support mobility operations that has at least 1 year of experience providing mobility services and which is registered with the CA Secretary of State prior to starting work. The mobility provider must be identified now or within 3 months of voucher execution. The mobility provider may be the Lead Applicant if they meet the criteria. This does not reflect the full scope of information available for this section of the application. For the full scope, see IM Section C(3).

DETAIL ON NONPROFIT ORGANIZATION STATUS OF LEAD APPLICANT*
These questions are only for Applicants who indicated that their organization type is "Nonprofit Organization." Other Applicants will not see them. In the field, [Non-Profit Employer Identification Number (EIN)], enter the Lead Applicant's EIN. Eligible non-profit organizations must be registered as 501 tax-exempt entities under IRS and in active and good standing at the time of application submittal in order to receive CMO MPV funding. In the field, [CA Secretary of State Registration Number], enter the CA Secretary of State Registration Number. Eligible non-profit organizations must be registered with the CA Secretary of State and be in active and good standing at the time of application submittal in order to participate in the CMO program.

In the field, [Year of Incorporation], enter the year that the organization was incorporated. At the time of application submittal, eligible non-profit Lead

Applicants must have been incorporated for at least 1 year. Organization must be based in California or have at least one full-time staff person based in California. In the field, [Address of Main Office or Primary Contact Based in California], enter the main address for the organization that is based in California. This does not reflect the full scope of information available for this section of the application. For the full scope, see IM Section C(1).

DETAIL ON TRIBAL GOVERNMENT STATUS OF LEAD APPLICANT *
These questions are only for Applicants who indicated that their organization type is "Tribal Government." Other Applicants will not see them.

In the [Type of Tribal Government] field, select which type applies. A Tribal Government may be a Federally-Recognized Tribe located in CA on the Federal Register List or a Non-Federally Recognized Tribe located in CA on the CA Native American Heritage List. To be eligible, the named Lead Applicant must be the tribal government referenced in this section. This does not reflect the full scope of information available for this section of the application. For the full scope, see IM Section C(1).

DETAIL ON PRIOR COMMUNITY TRANSPORTATION NEEDS ASSESSMENT (CTNA) FUNDING FROM CMO*
This subsection is only shown to Applicants who indicate that they have previously received CMO funds to conduct a Community Transportation Needs Assessment (see "Status of Previous Related Funding from CARB").

Applicants that this section applies to should respond to all three question fields, [Select your CTNA Project awarded in 2020], [Is This Application Based on the Same Needs Assessment Funded by Your 2020 CTNA Voucher?], and [For the Needs Assessment Required in This Application, Shall We Use Your CTNA on File?].

The question fields provide qualified Applicants (i.e. those submitting an application based on the same assessment for the same project area as the one previously funded by CMO) an opportunity to direct the administrator to refer to their submitted report on file and skip most questions in "Section 4: Community Transportation Needs Assessment."

Applicants who have previously been awarded CTNA funding may also indicate that they wish to pursue a different project, in which case they will need to submit an original Community Transportation Needs Assessment

and complete the next subsection which addresses that topic as directed. This does not reflect the full scope of information available for this section of the application. For the full scope, see IM Section H.

SECTION 3: PROJECT NARRATIVE

This section addresses general information about the project proposal. This does not reflect the full scope of project narrative requirements. For the full scope, see IM Sections C, D, E, F, and G(1).

Provide a project name in the [Project Name] field. The project name is what the CMO administrator team will refer to the project in official program materials and with the public and media. The project name should reference the service model, target audience or community, and location (e.g., Bikeshare for Seniors in Hill Town's Sunset Neighborhood). This does not reflect the full scope of information available for this section of the application. For the full scope, see IM Section C and D.

In the [Project Overview] field, provide an overview of the project. The project overview must articulate the idea of the project and the logic for funding based on the application requirements in IM Sections C, D, E, F and G. The response must contain all of the following:

- Goals and/or objectives;
- Statement indicating that the goals and/or objectives are supported by the needs assessment;
- Description of intended users or riders and types of trips or destinations that will be served;
- Location of where service(s) will be provided;
- Types of mobility services or technologies that will be employed including supporting equipment or infrastructure; and
- Brief summary of team-member roles.

Additionally, if you seek funding for expanding an existing mobility service, include in the overview a description of how the project will result in increasing ridership or use of an existing mobility service. This does not reflect the full scope of information available for this section of the application. For the full scope, see IM Section C and D.

In the [Service Models] field, indicate one or more service models that will be supported by funds requested. Projects must be based on one or more eligible service models listed in IM Section E(1). Selecting more than one service model does not impact eligibility. Service models should be based on needs expressed in the needs assessment. This does not reflect the full scope of information available for this section of the application. For the full scope, see IM Section D(2).

In the [Vehicles to Be Deployed] field, indicate which vehicles will be supported with CMO funds and used in the project Vehicles must be zero-emission vehicles and must comply with CMO vehicle eligibility requirements listed in Implementation Manual Section G. Applicable voucher amounts are listed in Section E.

Select criteria for vehicles to be deployed:
- Bikes/scooters: Only new bikes/scooters (electric or conventional) and if electric bikes Class 1 or 2 are eligible for CMO funding;
- Motor vehicles: Eligible CMO motor vehicles are up to Class 6 (< 26,000 GVWR or <30' bus length or less);
- Light duty vehicles (LDVs): LDVs eligible for CMO funding must be **CVRP-eligible** at time of purchase. Eligible light-duty vehicles may be new or used. Used light-duty vehicles must meet CMO eligibility requirements for used vehicles, including but not limited to no less than 4 years old from date of purchase and no more than 48,000 miles driven; and
- Medium-duty vans and buses: Medium duty vans and buses are eligible for CMO-funding must be **HVIP-eligible** at time of purchase and must be NEW vehicles.

All vehicles used in the CMO project must be equipped with telematic devices. This does not reflect the full scope of information available for this section of the application. For the full scope, see IM Section D(3).

In the [Enter Your Requested Budget Amount] field, enter your budget. Maximum funding per project is $2,500,000. Applicants that move on to Phase 2 will provide more detailed budget information in accordance with eligibility requirements and provisions at that time. This does not reflect the full scope of information available for this section of the application. For the full scope, see IM Section D(6), E, and G.

The questions under **"Indicate the Status of Service Models in Your Community that are of the Same Type Which You Propose,"** address the presence of similar services in the community. Responses are needed to ensure that the Applicant has done due diligence in its assessment of community needs. The first aspect is whether and how similar services either have worked and then ceased in the past, and what lessons can be drawn from them. The second aspect is whether and how current services are operating in the local area that necessitate coordination in order to ensure that the community is benefitting from additional services. It is expected that engagement done for Community Based Transportation Needs Assessments, which are required for eligibility, would naturally reveal this information.

If you indicate that the same file currently operating in the community, you will receive question fields that direct you to summarize those services and your justification for starting a service model where one already exists. Please respond accordingly.

If you indicate that the same type of service(s) previously existed in the community and has/have ceased, you will receive question fields that direct you to summarize those services, your assessment of why it/they ceased, and a justification for starting a service model where previously operated and ceased. Please respond accordingly. This does not reflect the full scope of information available for this section of the application. For the full scope, see IM Section G(1).

SECTION 4: COMMUNITY TRANSPORTATION NEEDS ASSESSMENT

This section addresses details about your required Community Transportation Needs Assessment (CTNA), which has been completed within the past four years. This does not reflect the full scope of information available for CTNA requirements. For the full scope, see IM Section G(1)(c).

All Applicants must submit an original CTNA by following question prompts in this section except for previous recipients of CARB Regional Pilot Projects and previous recipients of 2020 CTNA VOUCHER funding. Applicants in those two exception cases will, based on information indicated in Section 1, only see a single box in Section 4 to check to confirm their intentions.

Questions in this section require a detailed accounting and substantiation of the Community Transportation Needs Assessment that has been done. If the Lead Applicant has not completed a Needs Assessment that is specific to a project area that the proposal is based on, or does not have responses to all of the question fields, then they are not eligible and ready to submit a Mobility Project Voucher application.

To proceed, the Applicant must complete seven fields. Complete the field for [Transportation Access Data – 3 Data Sources] by listing the 3 data sources and accessibility indicators that you used to develop a Transportation Access Data Analysis. The response should list data sources or indicators including but not limited to the following: (i) **U.S. EPA Walkability Index**, (ii) Vehicle ownership per household (from **Census American Community Survey**), (iii) Cost of existing transit and **average cost per week for fueling car**, (iv) **Median household income**, (v) Access to job opportunities (**from LEHD-LODE**), and vi. List any existing shared clean mobility projects in the community (ex. bikeshare, electric shuttle or buses, electric carshare, etc.); existing public transit stops; and/or existing bicycle routes. Consult the CMO Data Collection Guide and/or contact the CMO technical assistance team for guidance.

Complete the field for [Survey of Project Area Residents] by describing the required survey completed within the past 4 years of the project area residents. Include who was surveyed, what was included in the survey, when and where it was implemented, what distribution methods were used, and the number and nature of respondents. Surveys of residents regarding existing travel behavior are required. Surveys may have been administered through in-person interviews, paper or online questionnaires, and options must be provided for residents that do not have access. The survey is required IN ADDITION to your 2 community engagement activities. Note that the survey does not count towards the 2 community engagement activities.

Complete the field for [Copy of Survey Used] by uploading the actual survey that you used. Up to three files are permitted, with a maximum size of 20 MB each.

Complete the field for [Community Engagement – Activity 1] by describing the first of two required community engagement activities completed within the past 4 years that engaged project area residents you aim to serve. Include who was targeted to be involved, what were the goals and methods of the

engagement, where and when it took place, and the number and nature of actual participants.

Complete the field for [Community Engagement – Activity 2] by describing the second of two required community engagement activities completed within the past 4 years that engaged project area residents you aim to serve. Include who was targeted to be involved, what were the goals and methods of the engagement, where and when it took place, and the number and nature of actual participants.

Both of the Community Engagement activities must be done in addition to the Survey.

Complete the field for [Community Engagement – Additional (Optional)] if you wish to include information about an additional community activity. If you do wish to skip this question, write "n/a" or leave the field blank.

Complete the field for [Summary Report of findings upload] by attaching your summary report of your Needs Assessment findings. The Summary Report must summarize the outcomes of the Needs Assessment and demonstrate a direct connection between the Needs Assessment conclusions included in the report and a proposed service model (e.g., target community/audience, scale of project, service model). Up to three files are permitted, with a maximum size of 20 MB each. This does not reflect the full scope of information available for this section of the application. For the full scope, see IM Section G.

SECTION 5: PROJECT AREA

This section contains questions for all Applicants, along with follow-up questions for some Applicants. This does not reflect the full scope of information available for this section of the application. For the full scope, see IM Section D(1) and G.

Complete the field, [Where is Your Project Located?], by making the appropriate selection. The project area is the geographic area where community residents live, and most infrastructure is to be installed. This does not reflect the full scope of information available for this section of the application. See IM Section D(2) for the full scope of infrastructure siting requirements). Boundaries of the project area must be within at least one of

the three selections listed. An interactive map indicating eligible project areas is available on the CMO website at **www.cleanmobilityoptions.org** or **https://ww2.arb.ca.gov/sites/default/files/auction-proceeds/lowincomemapfull.htm**.

Complete section [Eligible Census Tracts of Project Area] by providing 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.go/FFIECGeocMap/GeocodeMap1.aspx**. If there are multiple census tracts, separate them with commas. This does not reflect the full scope of information available for this section of the application. For the full scope, see IM Section G.

Complete the field, [Project Area Setting Description], by choosing the best selection. All choices are eligible.

Applicants should select "unincorporated community" if and only if none of the project area falls within an incorporated area. If the Applicant makes this selection, it will prompt a request to provide information about whether the Applicant is separately applying for funding for other unincorporated communities (eligible Lead Applicants may submit up to three applications if all proposed project areas are entirely within unincorporated County jurisdiction). This does not reflect the full scope of information available for this section of the application. For the full scope, see IM Section C(1)(f).

Each Lead Applicant may only submit one application for MPV funding during each application window, except when the project area is in an unincorporated community where no city government represents the project area (for the purposes of this program, tribal land is not considered an unincorporated community). In this instance, eligible Lead Applicants may submit up to three applications only when all proposed project areas are entirely within unincorporated County jurisdiction

Complete the field, [Name of County (or Counties)], by providing an accurate response. This does not reflect the full scope of information available for this section of the application. For the full scope, see IM Section D(1) and G(1).

Project Area Setting Details*

Applicants that indicated their project involves part of a city/town, all of a city/town, or multiple cities/towns will be prompted with the field, [Name of City/Cities or Town(s)]. Please provide an answer.

Applicants that selected "Unincorporated Community" will be prompted with the field, [Name of Unincorporated Area(s)] and [Are You Applying as a Lead Applicant for Funding for Any Other Projects?] If the answer to the second question is "yes," the Applicant will further be prompted with the field, [Name or names of additional projects that you are applying for]. Please provide an answer. This does not reflect the full scope of information available for this section of the application. For the full scope, see IM Section D(1) and G(1).

Project Area Map

This subsection addresses the Applicant's project area map. Please use the Mapping Tool for [CMO Eligible Tracts (2022) (arcgis.com)](#) to draw your project area map and upload it to the [Project Area Map Upload] field. Up to three files are permitted, with a maximum size of 20 MB each. See https://www.cleanmobilityoptions.org/application-materials for supporting resources and/or contact our TA team for assistance. This does not reflect the full scope of information available for this section of the application. For the full scope, see IM Section D(1) and G(1).

SECTION 6: ATTESTATIONS AND SIGNATURE

This section forms an agreement that the primary contact, on behalf of the Lead Applicant, acknowledges and will comply with critical program and application rules and procedures. The primary contact must read, understand, and agree to comply with all eligibility requirements and general provisions for the application and potential voucher award, and the complete the [Signature Fields]. Please ensure that the whole team including legal counsel has read through and agrees to comply with all requirements in the IM.

This does not reflect the full scope of requirements for the Lead Applicant and general provisions. For the full scope, see IM Section C(1) and Chapter III.

ADDITIONAL INFORMATION

You may save and return to your application at any time prior to submission. After the application window opens at the date and time listed above, submit this application by returning to your saved application and pressing "submit." The "submit" function will be disabled until the moment that the application window opens.

Applications that are saved but not submitted during the application window will not be reviewed. To be considered, Applicants must submit complete applications even if their complete application is saved.

Use of the application form is strongly recommended but if desired the application may be downloaded and submitted by email to **application@cleanmobilityoptions.org** OR by mail to the Clean Mobility Options, address: CALSTART, 48 South Chester Avenue, Pasadena, CA, 91106.

If your application is approved, you will be notified by the Program Administrator within six weeks after the evaluation is completed of advancement to proceed to Phase 2. Key topics in the Phase 2 application are project milestone schedule, budget detail, financial sustainability plan, community resource contributions, community outreach plan, and supporting documents (e.g., letters of support and commitment where applicable). Free and comprehensive technical assistance is available to you with completing the Phase 2 application.

If you have any questions or need assistance, please contact the CMO Application Technical Assistance with your request.
- Email: info@cleanmobilityoptions.org
- Phone: (626) 744-5760
- Web: **www.cleanmobilityoptions.org**

We Are Here to Help

A technical assistant is available to help guide and aid you in the development of your application. **There are multiple ways to contact us:**

- info@cleanmobilityoptions.org
- 626-744-5670
- Online at www.cleanmobilityoptions.com