

# 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.<sup>5</sup> 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

<sup>5</sup> 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