Welcome
Tribal Community Transportation Needs Assessment
Application Walkthrough

September 8, 2022
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
• Voucher Eligibility
• Application Process

CTNA Application Walkthrough
• Step-by-Step Guidance (Sections 1-8)

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 clean, shared, zero-emission 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 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.
Clean and Shared Transportation

Zero Emission:

• Carsharing
• Bikeshare or Scooter-sharing
• Carpooling and Vanpooling
• Micro-transit (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 Vouchers (MPV)
- 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:
  o Contract between the CMO Program Administrator and Awardee that serves as “Promise of Payment”

• Payments Issued:
  o When project milestones are reached based on the Voucher Agreement terms
# Technical Assistance Support

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

<table>
<thead>
<tr>
<th>Get Technical Assistance:</th>
<th>Get Help With:</th>
<th>Technical Assistance is NOT:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>Understanding Eligibility</td>
<td>Filling out Application</td>
</tr>
<tr>
<td>Phone Calls</td>
<td>Budget Advice</td>
<td>Writing Budget</td>
</tr>
<tr>
<td>CMO Office Hours</td>
<td>Project Design</td>
<td></td>
</tr>
<tr>
<td>Onsite Information Sessions</td>
<td>Developing Partnerships</td>
<td></td>
</tr>
<tr>
<td></td>
<td>And more!</td>
<td></td>
</tr>
</tbody>
</table>
Technical Assistance Support

- Complete online form at the cleanmobilityoptions.org/help/
- Call into CMO Hotline 626-744-5670
- Access one on one assistance: info@cleanmobilityoptions.org
- CMO Thursday Office Hours: 12pm-1pm PT weekly - ZOOM
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
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**

- Purple: SB 535 Disadvantaged Communities (DACs)
- Orange: SB 535 Disadvantaged Communities & AB 1550 Low Income Communities
- Light Blue: 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

1. Technical assistance and application development.
2. All Needs Assessment applications due while application window is open.
3. 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.
4. Voucher execution and reimbursement training.
November 2, 2022, at 9:00 am PT
- Application Window Opens for CTNA

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

December 7, 2022
- CTNA Application Window Closes
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
### Section 1: Primary Contact Information

**Click here for guidance on section 1.**

<table>
<thead>
<tr>
<th>Individual's Name *</th>
<th>Title *</th>
<th>Email Address *</th>
<th>Phone *</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fill in</td>
<td>Fill in</td>
<td>Fill in</td>
<td>Fill in</td>
<td>Fill in</td>
</tr>
<tr>
<td>First and last name of lead applicant's primary contact for application correspondence.</td>
<td>Title or role in the organization.</td>
<td>Email address for submission receipt and other application correspondence.</td>
<td>Phone number of primary contact.</td>
<td>Additional information about communication, coordination, or accessibility. For example, &quot;I am hard of hearing.&quot; (optional).</td>
</tr>
</tbody>
</table>
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

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.

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.

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Role in Project</th>
<th>Organization Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fill in</td>
<td>Fill in</td>
<td>Select</td>
</tr>
<tr>
<td>Fill in</td>
<td>Fill in</td>
<td>Select</td>
</tr>
</tbody>
</table>

+ Add item
Section 2: Applicant and Team Profile

DETAIL ON TRIBAL GOVERNMENT STATUS OF LEAD APPLICANT

**Type of Tribal Government**

- Federally-Recognized Tribe located in CA on Federal Register List
- Non-Federally Recognized Tribe located in CA on CA Native American Heritage List
- Other

Select one of the above eligible tribal Lead Applicant types for projects located within SB 535 Disadvantaged Communities or AB 1550 low-income communities. Eligible tribal lead applicants are listed in IM Section C(1)(c).
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

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

Potential Transportation Gaps and Solutions the CTNA will Address

- What gaps exist?
  - Key unanswered questions
  - Lack of other specific knowledge
  - Insufficient engagement
  - Limitations with methods that have been employed to date
  - Outdated analyses

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

- Unmet needs in transportation, mobility or accessibility
Section 3: Project Narrative

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

<table>
<thead>
<tr>
<th>Activity</th>
<th>Month 1-2</th>
<th>Month 3</th>
<th>Month 4-5</th>
<th>Month 6</th>
<th>Month 7</th>
<th>Month 8-9</th>
<th>Month 10</th>
<th>Month 11</th>
<th>Month 12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop and Draft Resident Survey</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transportation Data Analysis</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conduct Resident Survey</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conduct Bike Repair Outreach</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Light Distributions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Online Webinar/Listening Session</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Social Media</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone Interviews</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Mobility Device Demonstration</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Summary Report</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Summary Report Presentations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>
Section 3: Project Narrative Cont’d

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

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 *

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://geonamefinder.geocodio.com, if multiple census tracts, please separate with commas.

Project Area Setting Description *

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.
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 multiple neighborhoods within an incorporated city/town
Most or all of one city/town
Multiple cities/towns
Unincorporated community
Tribal land
Other

Name of county represented by your Project Area:
Section 4: Project Area

Data you could use:
- Income
- Household Size
- Age
- Race
- Gender
- Languages Spoken
- Anything else you think is relevant

Who are the target demographics that will benefit from the project?

Name of County (or Counties) *

Data entered:

Description of Demographics

Data entered:

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

Project Area Map *

Data entered:

Section 4: Project Area

Project Area Map

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

Using the CMO Mapping Tool

1. Find your project area
2. Click the Icon
3. Click 'Select'
4. Click 'Select by Point'
Section 4: Project Area

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.

1. ArcGIS Web Map
   Clear prints
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


CMO Budget Template:

www.cleanmobilityoptions.org/application
Section 5: Budget Summary

• Provide a Budget Summary with estimated project costs
  o 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.

<table>
<thead>
<tr>
<th>Section 1: Project Components</th>
<th>Section 2: Description of Voucher Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>(a) Expense Category</td>
<td>(b) Item description</td>
</tr>
<tr>
<td>Transportation Access Data Analysis</td>
<td>Manager time</td>
</tr>
<tr>
<td></td>
<td>Associate 1 time</td>
</tr>
<tr>
<td></td>
<td>Associate 2 time</td>
</tr>
<tr>
<td>Community Engagement to Determine Gaps, Needs, and Preferences</td>
<td>Manager time</td>
</tr>
<tr>
<td></td>
<td>Associate time</td>
</tr>
<tr>
<td></td>
<td>Meeting events</td>
</tr>
<tr>
<td>Summary Report</td>
<td>Manager time</td>
</tr>
<tr>
<td></td>
<td>Associate 1 time</td>
</tr>
<tr>
<td></td>
<td>Associate 2 time</td>
</tr>
<tr>
<td>Project Preparation and Design</td>
<td>Manager time</td>
</tr>
<tr>
<td></td>
<td>Associate 1 time</td>
</tr>
<tr>
<td></td>
<td>Associate 2 time</td>
</tr>
<tr>
<td>Voucher Administration Costs</td>
<td>Travel</td>
</tr>
<tr>
<td></td>
<td>Printing</td>
</tr>
<tr>
<td></td>
<td>Mail</td>
</tr>
<tr>
<td>Grand Total</td>
<td>Grand Total - Voucher Funding Term (Voucher Funds)</td>
</tr>
</tbody>
</table>

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

- Transportation
- Access Data Analysis
- Community Engagement
- Summary Report
- Voucher Administration
- 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

Tribal Governments are EXEMPT from CBO requirements

For Applicants that indicate in Section 1 they are a Tribal Government, a message will appear saying that they may skip this section, and they will not be shown further questions.

SECTION 6. COMMUNITY-BASED ORGANIZATION SUPPORT

Click here for guidance on section 6.

The applicant may skip Section 6. This section does not apply to Tribal Governments, and the applicant indicated in section 1 status as Tribal Government.
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.
Questions?
Join Us for Upcoming Webinars

Upcoming CMO Webinar dates and times are
access [www.cleanmobilityoptions.org/events/](http://www.cleanmobilityoptions.org/events/)

- 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!