

Mobility Project Voucher (MPV) Application Phase 2 Walkthrough

2.15.2023
Clean Mobility Options

www.cleanmobilityoptions.org

Program Administration Team















Agenda



- CMO Program Overview
- MPV Overview
- MPV Application Process
- MPV Application Phase 2 Walkthrough
 Sections 1-7
- Next Steps



CMO Program Overview

This section provides an overview of the program background, goals, voucher types and Technical Assistance.





CMO Program

A statewide public program that empowers underresourced communities across California to identify and overcome mobility obstacles with funding for community needs assessments and clean, shared, zero emission transportation projects.







CMO 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 underserved communities, and California Energy Commission's Clean Transportation Program, which is investing more than \$1 billion to accelerate the deployment of zeroemission transportation infrastructure and support in-state manufacturing and workforce training and development.

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 Mobility Options:

- Carsharing
- Bikeshare or scooter-share
- Carpooling and vanpooling
- Microtransit (Innovative transit)
- Fixed route transit
- Ride-on-demand



About \$33 Million In Total Funding Available for Two Voucher Types



Community Transportation Needs Assessment (CTNA)

- 12-month term
- \$1 million total available
- Up to \$200,000 set-aside for eligible tribal governments
- Up to \$100,000 per CTNA project



About \$33 Million In Total Funding Available for Two Voucher Types cont.





Mobility Project Vouchers About \$33 million total available funds

- 5-year term
- Up to \$1.5 million per mobility project
- \$7.5 million set-aside for previous CTNA awardees
- \$3 million set-aside for tribal governments
- \$12.5 million Open Funding for Window 2 new MPV Awardees
- \$10 million set-aside for Current Window 1 MPV Awardees

Technical Assistance Support



One-on-One Support Available to All Prospective Applicants

Access Assistance:

- Email
- Phone calls
- Online form
- CMO office hours
- Information sessions

Get help with:

- Understanding eligibility
- Budget advice
- Project design
- Developing partnerships
- And more

Assistance is NOT:

- Filling out application
- Writing budget

Technical Assistance Support



Technical assistance can be accessed through

- Completing the online form at <u>cleanmobilityoptions.org/help/</u>
- Calling into CMO Hotline 626-744-5670
- Scheduling a CMO Information Session for virtual or in-person one-on-one assistance: info@cleanmobilityoptions.org
- Attending CMO Thursday Office Hours: 12 pm-1 pm PT weekly- ZOOM
- CMO Webinar Series and Recordings https://cleanmobilityoptions.org/events/



MPV Overview

This section provides an overview of MPV funding and eligibility requirements.

What is a Mobility Project?

MPV supports the planning, development and implementation of clean mobility options projects, with funding available for a variety of eligible project-related costs.



Eligible Project Areas

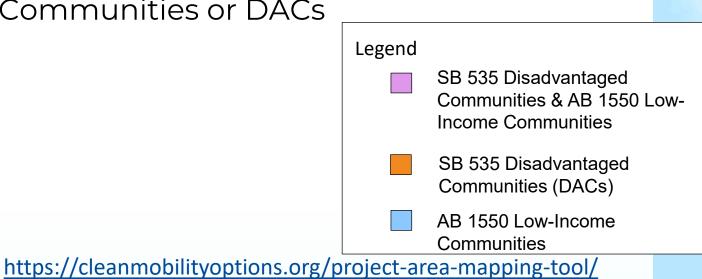


AB 1550 Low-Income Communities

SB 535 Disadvantaged Communities

Tribal Lands within AB 1550 Low-Income

Communities or DACs



Great Basin

Eligible Applicants



Lead Applicants

- Public Agencies
- Nonprofit Organizations
- Tribal Governments

Sub-Applicants

- Public, Private, or Nonprofit
 Organizations
- Includes Mobility Providers for
 - Community Outreach
 - Technical Expertise
 - Consulting Services

CTNA for MPV



Identification and evaluation of transportation access needs, preferences, and priorities in underserved communities through meaningful, representative community engagement and leadership.

Transportation Needs Assessment Components:

Transportation access data analysis:

- Community survey
- At least three data sources

Community Engagement:

 Minimum two engagement activities Final summary report



MPV Application Process

This section highlights MPV Application Phase 1 and what is needed in Phase 2.

MPV Application Process

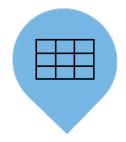


Phase 1





Phase 2



Includes:

- Project Team Profile
- Project Narrative
- Transportation Needs Assessment
- Project Area Profile
- Total Requested Voucher Amount
- Supporting doc (eligibility)

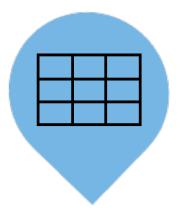
Includes:

- Project Narrative / Team Profile details
- Project Milestone Schedule
- Community Outreach Plan
- Community Resource Contribution
- Budget Worksheet
- Financial Sustainability Plan
- Supporting docs (where applicable)

MPV Application Process cont.



Phase 2 Final Application



The Program Administrator will notify applicants approved during Phase 1 of advancement to continue to Phase 2 and submit final application.

MPV Application Timeline



MPV PHASE 1 Open:

Application Window Opens March 1, at 9:00 am PT

Application Window Closes April 5, at 11:59 pm PT

Randomization

If oversubscribed on day-one, March 1, by 11:59 pm PT MPV Notice to
Proceed to Phase 2
May

MPV PHASE 2
Application
Submission
Deadline
Late Summer

MPV Notice of Intent to Award Early Fall

Mid Winter – Early Fall 2023

MPV Phase 2 Application Guide



Phase 2 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.
 - o cleanmobilityoptions.org/implementation-manual/



MPV Application Phase 2 Walkthrough



This section covers the step-bystep process of the Phase 2 Application (Sections 1-7).





Mobility Project Voucher Application – Phase 2 (Final Application)

Phase 2 of 2 (For Approved Applicants)

Welcome to the <u>Clean Mobility Options Voucher Pilot Project</u> (CMO) Final Application for Mobility Projects. This application is for approved applicants that have been deemed eligible for Phase 2.

Completed applications must be submitted after the Phase 2 application window opens on Wednesday, March 1, 2023 at 9:00 am Pacific Time and before it closes on Friday, March 31, 2023 at 11:59 pm Pacific Time. For CMO program information including the Implementation Manual, Application Guide, and supporting resources, please visit www.cleanmobilityoptions.org.

APPLICATION INSTRUCTIONS:

IMPLEMENTATION MANUAL:

MPV Phase 2 Application Overview





Fillable application form:

 Lead Applicant with an approved application from Phase 1, enters the Application Key that the administrator provided in your Phase 1 approval notification.

 The Application Key is used to incorporate the foundational materials submitted in Phase 1 into Phase 2 and allow you to pick up where you left off



Applications can be mailed to:

CALSTART
48 South Chester Ave.
Pasadena CA, 91106

Applications are not accepted by e-mail.

Section 1: Primary Contact Information



SECTION 1. PRIMARY CONTACT INFORMATION Click here for guidance on section 1.						
Application Key*						
Individual's Name *	Title *	Email Address *	Phone *	Additional Information		
Fill in	Fill in	Fill in	Fill in	Fill in		
First and last name of lead applicant's primary contact for application correspondence.	Title or role in the organization.	Email address for submission receipt and other application correspondence.	Phone number of primary contact.	Additional information about communication, coordination, or accessibility. For example, "I am hard of hearing." (Optional).		

Section 1: Primary Contact Information



Neither the Application Key nor the invitation to apply to Phase 2 is transferable to another organization. If you cannot locate your Application Key, please contact the Program Administrator for assistance.



Lead Applicant associated with the Application Key is legally responsible for project implementation and oversight of the entire project team.



Primary contact must enter information such as the Individual's Name, Title, Email Address, and Phone.



Additional information is optional such as special accessibility needs, secondary means of contact etc.

Section 2: Team and Project Details



SECTION 2. TEAM AND PROJECT DETAILS Click here for guidance on section 2.
Project Milestone Schedule *
Upload or drag files here.
Attach project milestone schedule using the template. Up to ten files, maximum of 10 MB each. File types accepted: .doc, .docx, .ods, .txt, .pdf, .xls, .xlsx, .csv, .ppt, .pptx, .jpeg, .jpg, .gif, and .png.
Additional Narrative (Optional)
Description in 6000 characters (which is about 2 pages) or less.

Section 2: Project Milestone Schedule



In the field "Project Milestone Schedule" upload a Project Milestone Schedule using the template that will be available on the CMO website.

This should include:

- (1) Milestones for planning, construction, deployment, operation, and reporting.
- (2) Key steps for community engagement.

Section 2: Project Milestone Schedule cont.

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Example Template:

MPV Project
 Milestone Schedule



[INSERT LEAD APPLICANT'S NAME]					
PROJECT MILESTONE SCHEDULE OVER 5-YEAR MOBILITY PROJECT VOUCHER TERM					
A. MILESTONE NUMBER	B. DESCRIPTION OF MILESTONE TO BE ACHIEVED	C. MONTH NUMBER ACHIEVED	D. CALENDAR DATE [ADD AFTER VOUCHER EXECUTION]		
Voucher Agreement Execution – COMPLIANCE					
1	Voucher agreement executed.	0 months	[Input AFTER Voucher executed]		
2	Project Kick-Off Meeting: Project must be deemed insurance compliant by the Program Administrator.	60 days (Program Requirement)	[Input AFTER Voucher executed]		
3	Secure contract with a Mobility Provider. Provide proof of contract to the Program Administrator that a mobility provider is secured and under contract.	3 months (Program Requirement)	[Input AFTER Voucher executed]		
1st Funding Year - PLANNING ([Kick-off meeting date] - 15 months) (Launch is required by 15th month)					
[insert number]	Acquire all planned CMO-funded vehicles and submit for reimbursement.	15 months (Program Requirement)	[Input AFTER Voucher executed]		

Section 2: Additional Narrative



In the field "Additional Narrative" discuss additional requirements or background related to successfully implementing the project and operating the service.

- If the project relies on a public process for any key approvals, or includes an "additional transportation enhancement," you must describe it here.
- You do not need to restate information already given in Phase 1 of the application.

Section 3: Community Based Organization (CBO) Support



SECTION 3. COMMUNITY-BASED ORGANIZATION SUPPORT 5lick here for guidance on section 5.
Does the Applicant Meet the Criteria to Be Considered a Community-Based Organization (CBO)? • Yes • No
Yes O No
Indicate at Least 2 of the Following Traits Which Qualify the Lead Applicant as a CBO* *
\square The organization is place-based, with an explicit geographic focus area that includes the proposed project area.
\square Staff members, volunteers, or Board members reside in the community where the project is located.
\square The organization has a demonstrated track record of at least one year providing services in the proposed project area.
To be considered a CBO, the organization must meet at least two of the three described criteria. If the applicant does not meet this criteria, it must secure a letter of support for the project from a CBO that does.
Illustrate that the Statements Checked are True with Brief Examples or Details *
Description in 3000 characters (which is about 1 pages) or less.

Section 3: CBO Support



Lead Applicants must either be a CBO or submit a letter of support for the proposal from a project-related CBO.

To be considered a CBO in the CMO program, an organization must meet at least two of the following criteria:

- The organization is place-based, with an explicit geographic focus area that includes the proposed project area;
- Staff members, volunteers, or Board members reside in the community where the project is located; and
- The organization has a demonstrated track record of at least one year of providing services in the proposed project area.

Section 3: CBO Support



In the field, "Does the Applicant Meet the Criteria to Be Considered a Community-Based Organization (CBO)?" select the correct answer.

When selecting Yes or No:

• If the selection is "yes," the applicant will have to check at least two of the three boxes corresponding to which traits qualify the organization as a CBO.

• If the selection is "no," the field "Provide Name of an Eligible CBO That Supports the Project" will appear. The Applicant must complete those fields accurately and in the same manner as in the paragraph above.

Section 3: CBO Support



In the field, "Illustrate How the Statements Checked are True with Brief Examples or Details," provide a simple explanation to substantiate the selections.

For example:

"Our organization is headquartered in Fresno, we have a stated mission of focusing on the San Joaquin Valley, all of our board and staff are located here, and we have been operating since 2010."

• The text limit is 3,000 characters (approx. 1 page).

Section 3: Letters of Support



In the field, "Letter of Support from CBO," applicants that are making use of a third-party CBO must provide a letter of commitment from the organization.

This should include:

(1) An explanation of how the CBO meets the minimum definition criteria.

(2) Demonstrates the CBO support for the project.

Section 3: Letters of Support cont.



Example Template:



- Letter of Support
- Letter of commitment





Templates: Letters of Support and Letter of Commitment

Overview

Below are overviews and templates for a Letter of Commitment (LOC) and a Letter of Support (LOS) to help you get the necessary letters prepared for your application. Please be advised that these templates are descriptive and not prescriptive, meaning you are free to modify them in order to best support your project proposal. Click on them below.

- 1. Overview: Letter of Commitment (LOC)
- 2. Template: Letter of Commitment
- 3. Overview: Letter of Support (LOS)
- 4. Template: Letter of Support

If you	then you must attach	
are a non-profit or a public agency	support letter from a community-based organization or local community group	

Section 4: Community Engagement Activities



SECTION 4. COMMUNITY ENGAGEMENT ACTIVITIES Click here for guidance on section 4.	
Description of Community Outreach Plan *	
	4
Description in 6000 characters (which is about 2 pages) or less.	
Description of at Least 5 Community Resource Contributions *	
Description in 6000 characters (which is about 2 pages) or less.	1
Documentation of Community Resource Contributions *	
Upload or drag files here.	
Up to ten files, maximum of 10 MB each. File types accepted: .doc, .docx, .ods, .txt, .pdf, .xls, .xlsx, .csv, .ppt, .pptx, .jpeg, .jpg, .gif, and .png.	

Section 4: Community Outreach Plan



In the field "Description of Outreach Plan," provide a detailed description of the strategy to engage with residents through outreach and education.

This should include:

- $\begin{pmatrix} 1 \end{pmatrix}$ Identifying key partners, their roles, and knowledge of the community.
- (2) Describing activities to promote and advertise the service to potential users.
- Plans to inform local business or stakeholders of construction or other elements of the project.

Section 4: Community Resource Contributions



In the field "Description of at Least 5 Community Resource Contributions," provide a list of a minimum of five eligible assets contributed to the project to support long-term sustainability of the project.

- Resource Contributions do not need to be monetary, and you are not required to estimate the monetary value of contributions.
- There is no minimum dollar amount or match requirement.
- Any costs claimed as a resource contribution cannot be reimbursed through voucher funding.

Section 4: Community Resource Contributions cont.



Example Resource Contribution Types

- Relationships with CBOs.
- Project-related labor costs (up to one year prior to application date) for planning, labor, construction, etc.
- Project-related labor costs during funding term but not paid for through CMO Voucher.
- Materials, assets, technology, and equipment already owned and/or donated to the project to be used during the funding term.



Section 4: Community Resource Contribution Documentation



In the field "Documentation of Community Resource Contributions," provide (upload) at least one document to demonstrate each item described in the Community Resource Contribution field.*

Example Resource Contribution

Relationship with CBO

Technology or Equipment

Additional Funding

Example Resource Documentation

Letter of Support

Purchase Documentation

Grant Agreement

^{*}see Implementation Manual, Table 3 (pg 41) for a full list of eligible resource contribution types and examples of supporting documentation.

Section 5: Budget and Financial Sustainability



SECTION 5. BUDGET AND FINANCIAL SUSTAINABILITY Click here for guidance on section 5.
Budget Using the CMO Template *
Upload or drag files here.
Attach a budget using the template from www.cleanmobilityoptions.org/application (required). Up to three files, maximum of 20 MB each. File types accepted: .doc, .docx, .ods, .txt, .pdf, .xls, .xlsx, .csv, .ppt, .pptx, .jpeg, .jpg, .gif, and .png.
Description of Plans to Sustain the Service for at Least the 5-Year Voucher Agreement Term *
Description in 6000 characters (which is about 2 pages) or less.
Description of Plans to Ensure Vehicles and Equipment Continue to Serve the Community if Operations Discontinue after 5 Years *
Description in 6000 characters (which is about 2 pages) or less.
Additional Budget and Financial Sustainability Documentation (Optional)
Upload or drag files here.
Attach a budget using the template from www.cleanmobilityoptions.org/application (required). Up to three files, maximum of 20 MB each. File types accepted: .doc, .docx, .ods, .txt, .pdf, .xls, .xlsx, .csv, .ppt, .pptx, .jpeg, .jpg, .gif, and .png.

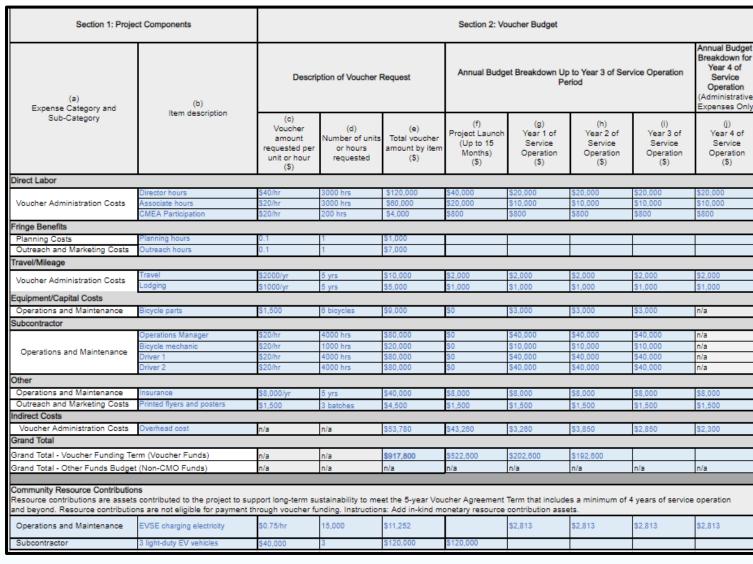
Section 5: CMO Budget



In the field "Budget Using the CMO Template," please upload your project budget using the CMO template that will be available on the CMO website

- Ensure the total is the same as the amount in Phase 1.
- Provide a clear, concise budget.
- This budget is the basis for future payment requests in CMO.

Section 5: CMO Budget cont.





Section 5: Vehicles and Equipment cont.



In the field "Description of Plans to Ensure Vehicles and Equipment Continue to Serve the Community if Operations Discontinue after 5 Years,"

- Discuss what will happen to project resources if the project does not continue beyond the 5-year term.
- Describe strategies or contingency plans to make sure that vehicles and equipment purchased through CMO will still be used by the community if the service does not continue after the voucher term.

Section 5: Vehicles and Equipment



In the field "Description of Plans to Ensure Vehicles and Equipment Continue to Serve the Community if Operations Discontinue after 5 Years," discuss what will happen to project resources if the project does not continue beyond the 5-year term.

 Describe strategies or contingency plans to make sure that vehicles and equipment purchased through CMO will still be used by the community if the service does not continue after the voucher term.

Section 5: Documentation



In the field "Additional Budget and Financial Sustainability Documentation,"

 provide documentation to validate any plans or expectations described in the previous two fields.

Section 6: Supporting Documents



SECTION 6. SUPPORTING DOCUMENTS Click here for guidance on section 6.
Letter(s) of Commitment from Each Sub-Applicant and Project Partner (Required if Relevant)
Upload or drag files here.
Up to ten files, maximum of 10 MB each. File types accepted: .doc, .docx, .ods, .txt, .pdf, .xls, .xlsx, .csv, .ppt, .pptx, .jpeg, .jpg, .gif, and .png.
Additional Supporting Documents (Optional)
Upload or drag files here.
Up to ten files, maximum of 10 MB each. File types accepted: .doc, .docx, .ods, .txt, .pdf, .xls, .xlsx, .csv, .ppt, .pptx, .jpeg, .jpg, .gif, and .png.

Section 6: Supporting Documents



The field "Letter(s) of Commitment from Each Sub-Applicant and Project Partner," will appear for applicants that indicated that the application includes sub applicants.

• Applicants may choose to submit letters of commitment here or wait until after potential voucher award (but must have before voucher execution).

 Each letter must include the sub-applicant's specific roles and responsibilities to the project.

Section 6: Supporting Documents cont.

The field "Additional Supporting Documents (Optional)," applicants may submit documentation to support responses to questions in any section of the application.

Applicants should indicate the field for which the document is purposed.

This field is optional.

Section 7: Attestation and Signature



SECTION 7. ATTESTATIONS AND SIGNATURE

Click here for guidance on section 7.

By signing and submitting this application, the Lead Applicant Organization and project team agrees to all of the following:

- . I am submitting this application on behalf of the Lead Applicant organization and am authorized to represent the organization on their behalf; and
- 2. The proposal has been reviewed by and has the support of the Lead Applicant organization's authorized body; and
- 3. I understand the CMO Mobility Project Voucher application process is comprised of two Phases, and this is the second of two Phases which we have been invited to submit based on our submission in Phase 1. By submitting this application, I attest that the materials submitted in Phase 1 are accurate and up-to-date, and I am not aware of any new information that would affect the accuracy of our materials submitted in Phase 1; and
- 4. All information provided in this Phase 2 application and any attachments are true and correct; and
- 5. On behalf of the Lead Applicant Organization and project team, I have read, understand and agree to abide by all of the requirements, terms and conditions in the CMO Implementation Manual;
- 6. I have read and am aware of the insurance requirements required of the Lead Applicant, sub-applicant and partners participating in the CMO program as listed in Section X of the Implementation Manual;
- 7. I am aware that the CMO Mobility Project Voucher program is a cost-reimbursement program based on actual costs incurred and verified through payment reimbursement requests and supporting documentation; and
- 8. I understand that the CMO Mobility Project Voucher program is a 5-year youcher agreement term with 4 years of youcher funding; and
- 9. The project proposal submitted in this application will have a minimum 4-year project operation period of mobility services in compliance with CMO program requirements; and

Signature Date *

10. Lagree to comply with CMO program requirements during the full 5-year voucher agreement term.

Signature *

Section 7: Signature and Attestation



The primary contact must complete the "Signature Fields."

 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.

 Please ensure that the whole team including legal counsel has read through and agrees to comply with all requirements for the application and potential voucher award.

Additional Resources



MPV Part One Sample Application









Mobility Project Voucher Application – Phase 2 (Final Application)

Phase 2 of 2 (For Approved Applicants)

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APPLICATION INSTRUCTIONS:

IMPLEMENTATION MANUAL:



Next Steps

This section covers Phase 2 Application Process and available Technical Assistance and Support.

MPV Application Phase 2 Next Steps

Clean Mobility Options

Applicant will receive a Notice to Proceed to Phase 2 May 2023.

Applicants submit Phase 2 Requirements:

- Summer 2023
 - Project Narrative
 - Project Milestone Schedule
 - Community Outreach Plan
 - Community Resource Contribution
 - Budget Worksheet
 - Financial Sustainability Plan
 - Supporting Doc (where applicable)

Applicant will receive Notice of Intent to Award.

CMO Webinar Series for Mobility Provider Voucher (MPV) Applicants

- MPV Application Phase 1- Walkthrough- <u>Recording Available</u>
 - o Dec 15, 2022, from 11 am-12:30 pm PT
- MPV Application Phase 1- Walkthrough for Tribal Governments- <u>Recording Available</u>
 - Dec 16, 2022, from 11 am-12:30 pm PT
- Setting Program Expectations for MPV Applicants- <u>Recording Available</u>
 - o Jan 18, 2023, from 11 am-12 pm PT
- CMO Mobility Provider Roundtable- <u>Recording Available</u>
 - Jan 25, 2023, from 11 am-12:30 pm PT
- MPV Application Phase 2 Walkthrough
 - o Feb 15, 2023, from 11 am-12 pm PT
- MPV Application Phase 2 Walkthrough for Tribal Governments
 - o Feb 16, 2023, from 11 am-12 pm PT

CARB's other Clean Mobility funding opportunities



Clean Mobility Investments:

Increased focus on and funding for community transportation needs assessments and planning grants. https://ww2.arb.ca.gov/lcti-projects-in-action

Clean Mobility in Schools Project (CMiS):

o Transform school communities by increasing awareness of and accessibility to clean technology, promote mode shifting, and maximize emissions reductions.

Sustainable Transportation Equity Project (STEP)

o Increase transportation equity in under resourced communities.

Access Clean California:

 Increase participation in overburdened communities and grow network of outreach partners. https://accesscleanca.org/

Program Administration Team













