



## Clean Mobility Options Implementation Manual Changes: Fiscal Year (FY) 2023-24

The Fiscal Year (FY) 2023-24 Implementation Manual (IM) for the Clean Mobility Options Voucher Pilot Program (CMO) was published on June 28, 2024. This version of the IM applies to voucher applications submitted on or after October 20, 2020, and addresses other general policy changes and clarifications. The IM is published at <https://www.cleanmobilityoptions.org/implementation-manual/>.

For more information and specific questions about the CMO IM, please contact [info@cleanmobilityoptions.org](mailto:info@cleanmobilityoptions.org).

### Summary of Key Updates:

#### Program Forms and Templates

The CMO program forms and templates table has been updated to include additional CMO website links, providing awardees access to the Capital Cost Reimbursement Form for voucher redemption, Community Transportation Needs Assessment (CTNA) and Mobility Project Voucher (MPV) Agreement templates, and Exhibit K - Recordkeeping and Reliability Standards for Electric Vehicle Chargers and Charging Stations.

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#### Funding Plan for Clean Transportation Incentives

In November 2023, as part of the FY 2023-2024 Funding Plan for Clean Transportation Incentives, the California Air Resources Board (CARB) approved allocating \$50,000,000 to Sustainable Community-Based Transportation Equity Mobility Projects, which of this amount, \$16,281,656.45 is allocated to CMO.

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#### Window 2 Mobility Project Voucher Application Window

The Window 2 MPV application submission window opened in 2023. For a full list of awardees and their locations please visit the [CMO website](#).

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### **Mobility Project Voucher Awardees Additional Funding**

Additional funding is now available for current MPV funded projects. Window 1 and Window 2 MPV Awardees are eligible for up to \$300,000 in additional funding on top of their current voucher amount of up to \$1,500,000 which will now increase to \$1,800,000. This additional funding can be used to cover unexpected increased insurance costs, capital acquisition, and other planning and operation activities in support of their current project scope and/or project expansion. Awardees do not need to submit a new application to be eligible but must provide updated justification documents to the Program Administrator.

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- Page 46 (includes a list of justification documents)

### **Eligible Motor Vehicles Gross Vehicle Weight Rating Threshold**

The eligible motor vehicle classes under CMO funding have been clarified and updated regarding the Gross Vehicle Weight Rating (GVWR) for light-duty and medium/heavy-duty vehicles. Vehicles with a GVWR of less than 8,500 lbs are classified as light-duty, while those with a GVWR between 8,501 and 26,000 lbs are classified as medium and/or heavy-duty vehicles.

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### **Clean Vehicle Rebate Program Eligibility List**

The Clean Vehicle Rebate Program (CVRP) is closed to new applications as of November 8, 2023. However, the CVRP vehicle eligibility list will still serve as an eligibility list for clean vehicle purchases for CARB's incentive programs, including CMO. The light-duty eligibility list is now located here: <https://ww2.arb.ca.gov/ZEV-eligibility-list>

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### **Infrastructure Definitions**

The Implementation Manual provides definitions for key Electric Vehicle Supply Equipment (EVSE) infrastructure terms. Definitions of infrastructure terms now include Electric Vehicle Supply Equipment, Electric Vehicle Charging Stations, Electric Vehicle Charging Port, Electric Vehicle Connector, Residential Real Property Containing Four or Fewer Dwelling Units, and Charging Station Operator.

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## **Eligible Infrastructure Improvements**

The EVSE infrastructure eligibility is updated to meet the California Energy Commission's (CEC) criteria. Dual Connector EVSE including SAE J3400 (the North American Charging Standard, or NACS) are now eligible for Level 2 EVSE and DC Fast Charger EVSE. For projects with CMO-funded Level 2 EVSE or Direct Current Fast Charger (DC FC) EVSE, the Open Charge Point Protocol (OCPP) has been updated to version 2.0.1 or later for implementation at the time of installation. Specifically, Level 2 EVSE, the certification for Level 2 has now been updated and must now meet UL 2594. Additionally, the network criteria for DC Fast Charger EVSE have been updated to require a cellular connection of 4G or higher.

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## **Electric Vehicle Charging Station Reporting and Recordkeeping Standards**

In accordance with Assembly Bill 2061 (Chapter 345, Statutes of 2022), any electric vehicle chargers and charging stations that receive funding from a state agency (including CMO) or charge ratepayers, and are installed on or after January 1, 2024, must comply with uptime recordkeeping and reporting standards outlined in the [CEC's regulations](#). These standards are detailed in Exhibit K of the MPV Voucher Agreement Template and on the [CMO website](#).

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## **Eligible Project Costs and Payable Activities for Operations and Maintenance**

Eligible costs and payable activities for operations and maintenance following the Operation Launch now include preventative maintenance for motor vehicles, micromobility devices, and infrastructure.

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## **Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project Eligible Vehicles Under Clean Mobility Options Voucher Pilot Program**

Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP) may fund or co-fund vehicles that are part of the CMO program, at CARB's sole discretion. However, if the vehicle is already paid by the CMO voucher, it cannot receive additional incentives. Please note, a single activity may not be billed to multiple public funding programs (i.e., double billing), and voucher funding may not be combined with other public incentives in a manner that leads to payment for a specific cost at an amount greater than the actual cost incurred.

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## **Mobility Project Voucher Financial Sustainability Plan: Clean Mobility Options Voucher Pilot Program Grant Funding Expenditures**

The Financial Sustainability Plan that is submitted for MPV Applicants advancing to the Phase 2 application clarifies that the applicant will detail how the project can be sustainable after the CMO grant funding is expended.

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## **Representative(s) of Awardees**

The IM provides clear definitions, including terms such as "Representative(s)" of Awardees, which encompass a range of associated personnel like contractors and consultants, and "subgrant" or "subaward," which distinguishes funding provided to support specific projects from contractual agreements for goods and services.

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## **Mobility Project Voucher: Conditions for Procurement of Vehicles or Delivery of Mobility Services**

The conditions for MPV Awardees whose voucher agreement includes procurement of vehicles or delivers mobility services relying on vehicles, have been revised under the terms and conditions. For vehicles purchased with the CMO voucher funds, if a new entity that holds the vehicle title is unable to operate the vehicle in accordance with the Voucher Agreement, the Awardee must promptly notify the Program Administrator.

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## **Coordination with California Energy Commission Clean Transportation Program Projects**

Under the terms and conditions for all CMO Awardees (Needs Assessment and Mobility Project Vouchers), the Awardee may be requested by CARB and CEC to coordinate with other CEC Clean Transportation Program Projects, including the California Electric Vehicle Infrastructure Project (CALeVIP), Communities in Charge (CIC), and Energy Infrastructure Incentives for Zero-Emission Commercial Vehicles (EnergIIZE).

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## **Developing Process for Disaster Recovery**

Under the terms and conditions for all CMO Awardees, the Awardee must develop a process for disaster recovery of all relevant software applications, websites, and data.

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## **File Retention and Transmission Policy for Voucher Agreements**

The file retention requirement under the terms and conditions for all CMO Awardee has been revised from three years to five years, requiring Awardees to retain files for the term of the Voucher Agreement plus five years, with no transmission to outside entities unless approved by CARB.

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## **Project Records Transfer**

The transfer of all project records to CARB or its designee has been revised from a three-year to a five-year retention period, now requiring the transfer of all records at the end of this extended window unless otherwise instructed by CARB.

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## **Voucher Agreement General Provisions**

The general provisions have been revised to align with the terms and conditions in the MPV voucher agreement template. These updates involve adding new general provisions and modifying existing ones in accordance with CARB policies.

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## **General Insurance Provisions Applicable to All Policies**

Awardees must comply with all requirements outlined in the General Insurance Provisions and have been revised to provide clear communication of requested endorsements and policies with a Self-Insured Retention (SIR).

### **Endorsements**

All required endorsements requested by the Program Administrator are clearly outlined under the endorsement provision. For any work or activity performed or carried out in whole or in part using Grant Funds or to carry out any term or condition of this Grant Agreement, each insurance policy must name “the State of California, the California Air Resources Board, the California Energy Commission, the Program Administrator (CALSTART), and each of its and their officers, agents, and employees as additional insureds” by an endorsement that states the names exactly as stated above in the Voucher Agreement. In addition, A Waiver of Subrogation or Right to Recover endorsement in favor of the State of California must also be attached to the certificate.

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### **Satisfying a Self-Insured Retention**

The general insurance provisions clarify that all policies with an SIR shall be endorsed to allow the State or Program Administrator to satisfy the SIR or Deductible at the State’s discretion.

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## **Mobility Project Voucher Insurance Requirements**

The Awardee shall maintain commercial general liability and shall display a “per project aggregate” endorsement. In addition, the policy shall expressly include “any electric bikes and scooters in connection with any such work or operations.”

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## **Self-Insurance**

If an Awardee opts to be self-insured, the CMO insurance requirements now specify the supporting documents for Workers' Compensation and other policies that must be submitted to the Program Administrator.

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## **Minimum Items for Project Status Reporting**

### **Vehicle and Infrastructure Equipment Specifications**

In addition to the current project status reports on vehicle and infrastructure equipment specifications, the Awardee's quarterly project data shall include the serial number of the installed charging equipment.

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### **Vehicle and Infrastructure Equipment Operations**

The vehicle and infrastructure equipment operations submitted in the quarterly project status reports clarify the requested data reporting requirements. The Awardee shall provide the average kilowatt-hour (kWh) or kilowatts (kg) dispensed per session, broken down by charging power level. Additionally, the Awardee will report any service outages due to accidents, incidents, or events affecting vehicles and infrastructure (as available).

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### **Job Creation and Workforce Training**

The job creation and workforce training data submitted in the quarterly project status reports clarify the reporting on location of job creation, including inside or outside priority population area.

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*Clean Mobility Options Voucher Pilot Program is part of California Climate Investments, 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.*