Planning and Capacity Building, Clean Mobility in Schools (CMIS), and the Sustainable Transportation Equity Project (STEP)

Public Work Group Meeting #2
January 18, 2023

Agenda

Time	Topic*
2:00 pm	Welcome and Introductions
2:05 pm	Agenda, Timeline, and Work Group Schedule
2:15 pm	Background, Recap, and Past Feedback
2:30 pm	Planning and Capacity Building Administrator Solicitation
3:10 pm	Concept Phase Requirements and Criteria
3:30 pm	Full Application Phase Requirements and Criteria
3:55 pm	Next Steps
4:00 pm	Adjourn

*Time for comments & questions is included within each topic.

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Anticipated Timeline

Public Work Group Meeting #1
December 2022

Public Work Group Meeting #2
January 2023

Public Work Group Meeting #3
February / March 2023

Application Technical Assistance Request for Proposal (RFP) Window
Winter 2022/23

Public Comment Period
February 2023

Solicitation Period
April – July 2023

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Work Group Meetings

Work Group Meeting #1
December 12, 2022
- Background and past feedback
- Transportation equity
- Solicitation approach
- Community-led project solicitation
- Planning and Capacity Building administrator solicitation

Work Group Meeting #2
January 18, 2023
- Recap of meeting #1
- Scoring criteria
- Funding priorities

Work Group Meeting #3
February / March 2023
- Recap of meeting #2
- Public comment period
- Example projects

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Other Upcoming Opportunities

Clean Mobility Options Application Window 2
Apply Mobility Project Vouchers on March 1, 2023

Pre-application Technical Assistance Webinars
Now – Feb 2023

https://cleanmobilityoptions.org/events/

Adult Education & Vocational Schools Zero-Emission Vehicle Workforce Training Project
Apply in early 2023

https://ww2.arb.ca.gov/our-work/programs/low-carbon-transportation-investments-and-air-quality-improvement-program/low-0
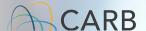
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POLL #1

What type of organization do you represent?

- ❏ Community-based organization
- ❏ Institution of higher education
- ❏ Local or regional government
- ❏ Nongovernment or nonprofit organization
- ❏ Private mobility or school transportation provider
- ❏ School district or local education agency
- ❏ Consultant
- ❏ Transit agency
- ❏ Tribal government
- ❏ Other

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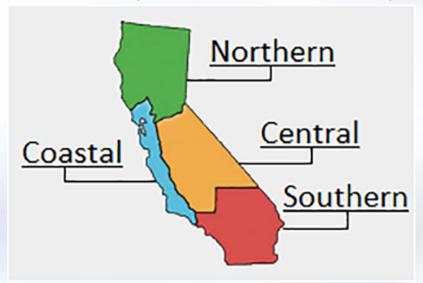# POLL #2

What region of California is your community located in?

- ❑ Northern
- ❑ Central
- ❑ Coastal
- ❑ Southern
- ❑ Statewide

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Background
Fiscal Year 2022-23

$5M for Planning and Capacity Building
Community-led transportation planning, community engagement, and workforce training/development efforts

$15M for Clean Mobility in Schools
Zero-emission transformations at schools in priority populations

$15M for the Sustainable Transportation Equity Project
Community-identified clean transportation solutions for priority populations

$20M for Clean Mobility Options
Expand clean transportation options and community-led shared mobility projects for priority populations and tribal governments

- $55 million (M) in total for clean mobility investments in fiscal year (FY) 2022-23
- Provide zero-emission and clean mobility options tailored to priority population needs
- Expand transportation choices and reduce vehicle miles traveled
- Invest in <u>low-income and disadvantaged communities</u> (CalEnviroscreen 4.0)

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Planning and Capacity Building Goals

Projects are intended to increase transportation equity by:

- Improving local understanding of residents' transportation needs

- Preparing communities to implement clean transportation and land use projects

- Developing a foundation for organizational and community capacity building

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CMIS and STEP Goals

Projects are intended to increase transportation equity by:

- Addressing community-identified needs

- Increasing access to key destinations

CMIS focus: Support public school districts

STEP focus: Reduce vehicle miles traveled

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TWO FY 22-23 Solicitations

#1 – Solicitation for Community-based Projects

- $3M for Planning and Capacity Building projects (grants through Administrator, see Solicitation #2)
- $15M for CMIS projects (CARB grants)
- $15M for STEP projects (CARB grants)

#2 – Solicitation for Technical Assistance (TA) Provider & Planning and Capacity Building Administrator

- $5M CARB grant
  - $3M to community-based Planning and Capacity Building projects (see Solicitation #1)
  - $2M to administer Planning and Capacity Building grants AND provide TA for Planning and Capacity Building, CMIS, and STEP projects

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Recap Work Group #1 – Transportation Equity

What We Heard	Our Response
Consider broader definition, which could capture multi-sector benefits, capacity building, and delivery of services	See updated definition on the next slide.
Acknowledge the unique barriers that different populations may face to transportation	See updated definition on the next slide.

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Transportation Equity

"Transportation equity occurs when the transportation system addresses the unique transportation barriers and improves the quality of life of residents disproportionately impacted by air pollution or who lack access to services."

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Recap Work Group #1– Phased Solicitation Approach

What We Heard	Our Response
Provide support during application development. Especially focus TA between concept and full phases on meaningful community engagement and financial sustainability planning.	We will work with the selected TA provider to focus on these elements.
Provide feedback on applications along the way to help applicants improve.	We will look into how we may be able to do this after the concept phase.
Provide straightforward and smart budget template (e.g., California Energy Commission (CEC) Electric Program Investment Charge (EPIC) Challenge template).	We will work on improving the budget template based on the examples suggested.
Provide one application that will work for multiple programs.	We will aim for this.
Estimate effectiveness of projects in reducing greenhouse gases and vehicle miles traveled.	The California Climate Investments Benefits Calculator will be used for this after projects are selected.

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Recap Work Group #1 – Eligible Applicants and Projects

What We Heard	Our Response
Provide more guidance on types of successful partnerships and support public-private partnerships	We will provide this in the solicitation and work with the TA provider to support this.
Car parking systems that dis-incentivize driving should be included	Parking pricing pilots, policies, and programs to support mode shift away from single-occupancy combustion vehicles is an eligible project component.
Electric infrastructure needs to be installed/upgraded at the same time as vehicles are purchased	We will try to coordinate more with the CEC and incentivize this via scoring.
Outreach and education should be a part of each project	We will incentivize this via scoring.
Create structures for moments of reflection and strategizing based on real-time feedback	We will work with the TA provider to support this.

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Recap Work Group #1 – Technical Assistance & Administrator Solicitation

What We Heard	Our Response
TA highest priorities include Capacity Building and Evaluation and Impact Assessment	We will provide this in the solicitation and work with the TA provider to support this.
TA should be organized as regional support and come from multiple entities. Also, TA funding needs to be made as equitable as possible. This is more than hiring locally.	We will continue to explore how we may be able to do this.

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Past Feedback

- Significant demand for funding
- Application process and requirements are complex
- Prioritize outreach and investments
- Tailor offerings based on community need
- TA, partnership development, and capacity building are needed
- Financial sustainability is a challenge
- Insurance costs are high
- Implementation delays and increased costs persist

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Comments and Questions

Use the raised hand function (#2 if calling in by phone).

Please state your name and affiliation before asking a question or making a comment.

Planning and Capacity Building
Administrator Solicitation - Funding

- $2M total budget (based on feedback)
  - Annual budget ~$670k per year (3-years)
- Priorities
  - Administer $3M in Planning and Capacity Building grants
  - Technical assistance for implementation support for 6-22 grantees (including CMIS and STEP)
  - Regional technical assistance approach
  - Unsuccessful applicant technical assistance

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Planning and Capacity Building
Administrator Solicitation – TA Scope

Organizational Capacity Building	Grant Management	Project Implementation	Evaluation and Impact Assessment
• Needs assessment • Strategic planning • Relationship building • Grant writing	• Administration • Plan development • Budgeting including participatory budgeting • Tracking progress • Meeting facilitation	• Permitting/Site planning • Equitable community engagement • Financial sustainability	• Data collection • Data analysis • Identify metrics for success and multi-sector benefits • Support evaluation of project's impact on transportation equity

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Planning and Capacity Building
Administrator Solicitation – Regional Approach

- Benefits include:
  - Fostering local place-based partnerships
  - Providing community-specific TA needs/expertise
- Distribution of regions
  - Geographical diversity
  - Tailored support to specific community types (e.g., rural, agricultural, tribal, Black and African American)
- $2M budget (from FY 2022-23)

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POLL #3

What should the geographic distribution or regions look like?

- ❏ 4 Regions aligned with EPIC Challenge (Bay Area, N. California/Central Valley, Los Angeles, Imperial Valley/Inland Empire/San Diego)
- ❏ 9 Regions aligned with California's 4th Climate Change Assessment (Central Coast, Inland Deserts, Los Angeles, North Coast, Sacramento Valley, San Diego, SF Bay Area, San Joaquin Valley, Sierra Nevada)
- ❏ Allow grantee to propose regions
- ❏ Other

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Comments and Questions

- What should be prioritized to ensure long-term success?
- Is there concern with focusing on a few regions initially and then building this over time to include the whole State?
- What could this look like with the available funding?

Use the raised hand function (#2 if calling in by phone).

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Eligibility Requirements: Concept Phase

Application Section	Eligibility Requirement
Basic project description	Is project eligible?
Identification of Lead Applicant and sub-applicants and tentative partnership structure	Are applicants eligible?
Conflict of interest declaration	Was declaration provided?
Project area map and description	Is community eligible?
Estimate of total budget request	Is request within available budget?

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Project Area Eligibility

- At least 50% of the project area is disadvantaged or low-income community census tracts, per CalEnviroscreen 4.0

Scoring Criteria: Concept Phase

Application Section	Scoring Criteria
Basic project description	Project meets basic program goals (slides #10-11)
Description of how project addresses community-identified needs and increases transportation equity	Project addresses community-identified transportation needs and increases transportation equity

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Extra Points

- Lead Applicant is a <u>tribal government </u>or a <u>community-based organization</u>

- Project is in a <u>rural</u> community

- Project was identified through a <u>STEP Planning and Capacity Building grant</u>

- Community has not received CARB clean mobility implementation funding before

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Needs-based Criteria

- Clean mobility investments have needs-based threshold (low-income and disadvantaged community requirement)

- Potential option to expand needs-based approach through scoring criteria

  - Example: project is in top 5% of disadvantaged communities

Comments and Questions

- What concept phase eligibility requirements may be challenging to meet?
- What criteria could CARB use to score applications based on need?

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Please state your name and affiliation before asking a question or making a comment.

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Solicitation Process

- Applicants must submit concept application to be eligible to move on to full application phase

- CARB staff will check eligibility requirements and score applications using scoring criteria

- The highest-scoring eligible applications will be moved on to full application phase

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POLL #4

What should CARB use to determine how many applicants move from the concept to full application phases?

❑A specific percentage of applicants

❑A specific number of applicants

❑Just enough applicants to use the available budget

❑All applicants who meet the eligibility requirements

❑Other

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Eligibility Requirements:
Full Application Phase

Application Section	Eligibility Requirement
Partner letters of support	Was one provided for each partner?
Detailed scope of work and timeline	Was it provided?
Consistency with existing plans	Is the project consistent with existing plans, where possible?
Detailed budget	Does the budget meet budget requirements?
Confirmation of ability to meet readiness requirements / California Environmental Quality Act (CEQA) worksheet (if relevant)	Will the project meet readiness requirements?
Data tracking and reporting plan	Does the plan meet data requirements?

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Budget Requirements

❑ At least 50% of the total proposed budget funds projects located within disadvantaged or low-income community census tracts

❑ At least 50% of the total proposed budget funds clean transportation projects (CMIS and STEP)

❑ At least 2% of the total proposed budget funds data tracking and reporting

No resource contribution required

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Readiness Requirements

❑ Documentation confirms that CEQA clearance has or will be met within six months after grant execution (CMIS and STEP)

❑ Documentation confirms that any relevant site control, permits, or other non-CEQA readiness requirements have or will be met before project is scoped to start

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Data Requirements

❑ Plan includes benefits quantification after grants are awarded (CMIS and STEP)

❑ Plan includes annual data reporting for all projects during grant term, which may include:

- Basic project data (e.g., # of participants per event, # of vehicles deployed)
- Telematics data
- Demographics of participants/users
- Surveys of project participants/users
- Employment outcomes data
- Other data that may be useful for feedback on project or third-party evaluations

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Scoring Criteria:
Full Application Phase

Application Requirement	Scoring Criteria
Project narrative	Project meets program goals and community needs, employs innovative solutions, and supports an integrated clean transportation system
Description of applicant roles/experience	Applicants have organizational capacity and ability to fulfill identified roles
Description of partnership structure	Partners include a diverse group of key stakeholders and incorporate an equitable structure and meaningful processes to incorporate resident-led decision-making
Community engagement and outreach plan	Project incorporates diverse, context-specific approaches for community engagement, outreach, and education for all applicable project types

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Scoring Criteria:
Full Application Phase (Cont'd)

Application Requirement	Scoring Criteria
Financial sustainability plan	Project includes a clear plan for use of the project in the long-term or defines a plan to determine financial sustainability during the grant term
Detailed scope of work, timeline, and budget	Scope, timeline, and budget are feasible and identify all deliverables needed to achieve objectives
Workforce development (if relevant)	Project supports workforce development in the climate and clean transportation sectors for residents that face barriers to employment
Displacement avoidance (if relevant)	Project includes supporting new or coordinating with existing policies and programs to counter any displacement that may have occurred due to the project

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Comments and Questions

- What full application phase eligibility requirements may be challenging to meet?
- What other scoring criteria should be factored in?
- Other comments and questions on topics we haven't covered?

Use the raised hand function (#2 if calling in by phone).

Please state your name and affiliation before asking a question or making a comment.

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Thank you!

Next Steps:

- **Survey** – *Send us additional feedback*

- **Work Group #2 Recording and Notes –** *Posted by Feb. 1*

- **Work Group #3 –** *Feb/Mar 2023*

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