

Statewide Planning and Capacity Building Project Administrator

Fiscal Year 2022-23 Grant Solicitation



Note:

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July 24, 2023

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Overview

I. Summary

Through this Solicitation, the California Air Resources Board (CARB or the Board) is soliciting a Grantee to serve as the Planning and Capacity Building Project Administrator (PCB Administrator) and provide capacity building, administrative, and implementation support to project awardees and their partners implementing the following three categories of projects: Planning and Capacity Building (Planning), Clean Mobility in Schools (CMIS),¹ and the Sustainable Transportation Equity Project (STEP).² The overarching purpose of these programs is to increase transportation equity in disadvantaged and low-income communities³ throughout California.

Increasing transportation equity will create equitable access to social and economic opportunities for traditionally underserved communities. Attaining transportation equity requires considering all components of Title VI of the Civil Rights Act of 1964, environmental justice principles,⁴ and nondiscriminatory practices.⁵ Transportation equity will occur when the transportation system addresses unique transportation barriers; shifts decision-making power to the communities the system serves; and improves the quality of life for low-income people, people of color, and residents of communities disproportionately impacted by air pollution or who lack access to housing, jobs, and services.

Through the Low-Carbon Transportation Investments Fiscal Year (FY) 2022-23 Funding Plan,⁶ CARB has \$5 million available for a PCB Administrator. One Lead Applicant will be selected from this open, competitive process and awarded the grant. CARB must receive complete applications by **11:59 pm (Pacific Time) on September 22, 2023 (the Application Deadline)**. The selected PCB Administrator will distribute \$3 million of the \$5 million to Planning awardees, and the remaining \$2 million is intended to support the PCB Administrator's other implementation activities, consisting of capacity building, administrative, and project implementation support to all Planning, CMIS, and STEP project awardees, which will be selected by CARB through a separate Request for Applications (RFA) process.

¹ <https://ww2.arb.ca.gov/lcti-clean-mobility-schools-pilot-project>

² <https://ww2.arb.ca.gov/lcti-step>

³ CARB's California Climate Investments Disadvantaged and Low-income Communities Map: <https://webmaps.arb.ca.gov/PriorityPopulations/>

⁴ <https://www.ejnet.org/ej/principles.pdf>

⁵ U.S. Department of Transportation's Transportation Planning for Equity tools https://www.planning.dot.gov/planning/topic_transportationequity.aspx

⁶ https://ww2.arb.ca.gov/sites/default/files/2022-10/proposed_fy2022_23_funding_plan_final.pdf

Planning and Capacity Building is part of California Climate Investments, a statewide initiative that puts billions of Cap-and-Trade dollars to work reducing greenhouse gas (GHG) emissions, strengthening the economy, and improving public health and the environment—particularly in disadvantaged communities.

II. Background

Planning and Capacity Building is the newest distinct category of Clean Mobility Investments introduced by CARB in FY 2022-23 and developed to help overcome barriers identified in CARB’s Low-income Barriers Study, Part B: Overcoming Barriers to Clean Transportation Access for Low-income Residents⁷ and address key challenges outlined in CARB’s 2022 Draft Progress Report for California’s Sustainable Communities and Climate Protection Act.⁸ Other key pieces of legislation that provide the framework and funding to support Planning and Capacity Building are identified in the [Guiding Legislation](#) section of this Solicitation.

Past funds for planning and capacity building have primarily been awarded through Access Clean California, the Clean Mobility Options Voucher Pilot Program, and STEP. Based on community needs, CARB has expanded this funding into a dedicated category specifically for community-led planning and capacity building projects. This enables a more diverse set of projects focused on clean mobility transportation planning, community transportation needs assessments, community capacity building, outreach, workforce training and development, ongoing technical assistance, and other critical community-led clean mobility investment needs.

CMIS was first introduced by CARB in FY 2018-19. STEP was first introduced by CARB in FY 2019-20. Both CMIS and STEP, as well as Planning, aim to address community residents’ transportation needs, increase equitable access to key destinations, reduce vehicles miles traveled (VMT), and reduce GHG emissions through a variety of synergistic activities that enable and encourage residents to utilize clean mobility solutions. Planning, CMIS, and STEP have the flexibility to fund many different types of capital, operations, planning, and capacity building projects to help meet the needs of each community within that community’s context. A profile of projects funded in previous years are available on CARB’s Projects in Action⁹ webpage.

Concurrent to the release of this Solicitation, CARB is releasing an RFA for community-based Planning, STEP, and CMIS projects. Through the RFA, CARB will fund projects that work together to increase community residents’ access to key destinations without needing a personal vehicle. Awardees selected through the RFA process will create and evaluate new, innovative strategies to address community residents’ transportation needs and increase residents’ access to key destinations, while

⁷ <https://ww2.arb.ca.gov/our-work/programs/accessible-clean-transportation-options-sb-350>

⁸ <https://ww2.arb.ca.gov/resources/documents/tracking-progress>

⁹ <https://ww2.arb.ca.gov/lcti-projects-in-action>

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simultaneously reducing GHG emissions and vehicle miles traveled. The suite of components funded in these grants includes a wide variety of clean transportation and supporting projects that increase mobility and reduce VMT, such as electric carshare, bikeshare, and shuttle services; supporting infrastructure projects; zero-emission school bus fleet deployments; public transit subsidies and network-fare integration projects; bike lanes; urban forestry; community outreach and education; workforce development programs; and transit-oriented development and displacement avoidance planning—all while centering community needs and decision-making.

For FY 2022-23 funding, CARB will select and award \$29.65 million to approximately two (2) to four (4) STEP and CMIS projects and will use \$3 million of the \$5 million allocated for this Solicitation to fund between 6-15 Planning projects across the state to implement clean transportation and supporting projects in disadvantaged and low-income communities. Planning, CMIS, and STEP awardees may include community-based organizations, tribal governments, local governments, and public schools.

The PCB Administrator selected through this Solicitation will be responsible for providing capacity building and implementation support to the Planning, CMIS, and STEP awardees. The PCB Administrator will also directly administer, execute agreements with, and oversee the \$3 million in funds allocated to the Planning awardees. CARB will directly oversee and manage grant agreements with CMIS and STEP awardees. The PCB Administrator, in coordination with CARB, will provide CMIS and STEP awardees with administrative support, such as disbursement request development, and other activities as detailed in the [Scope of Work](#). To avoid real or perceived conflicts of interest, the PCB Administrator (including its Sub-applicants, contractors, subcontractors, consultants, members of the Project Team, affiliates, employees, representatives, and officers) will not be eligible to be a Planning, CMIS, or STEP awardee or funding recipient for any project selected for funding for the length of their agreement. Additional conflict of interest evaluation by CARB may be appropriate depending on the specific project. In addition, the PCB Administrator will not be part of the Planning, CMIS, or STEP application review process.

This Solicitation is made available by electronic means only. In the event of conflict between a version of the Solicitation in the Applicant's possession and the latest version maintained and posted on CARB's website,¹⁰ the latest version on CARB's website will govern.

III. Project Objectives and Vision

This Solicitation is focused on increasing transportation equity in disadvantaged and low-income communities by strengthening local coordination, leadership, knowledge, and skills through tailored community-led project implementation support. The PCB Administrator will collaborate with CARB-selected Planning, CMIS, and STEP awardees

¹⁰ <https://ww2.arb.ca.gov/our-work/programs/low-carbon-transportation-investments-and-air-quality-improvement-program/low>

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and provide capacity building, administrative, and implementation support as awardees implement sustainable and multi-benefit clean transportation efforts. Specifically, capacity building, administrative, and implementation support includes, but is not limited to:

- Peer-to-peer networking and learning, including but not limited to discussion forums, presentations, and skill-based training with a preference for leveraging existing networks and forums.
- Project-specific support in the development of actionable plans and projects, particularly for data collection and long-term sustainability planning.
- Support on equitable community engagement, decision-making, partnerships, and operationalizing equity.
- Organizational capacity building, particularly for budgeting and grant management.
- Support with regional coordination.

Each Planning, CMIS, and STEP awardee will operate at varying scales and within different contexts; as such, the level and types of support needed will vary by awardee. Providing this level of tailored support can be complex, and CARB encourages all Applicants to consider how a regional approach might be applied to this work. Applicants are encouraged to develop a structure that relies on “Regional Teams” to build capacity for clean transportation, awardees implementing their projects, particularly school districts, connect potential partners, and support peer learning.

Regional Teams should include grassroots and community-based organizations that can support public engagement to inform planning efforts, build effective relationships between government entities and communities, build capacity of community-based organizations to engage in planning and clean transportation policy initiatives and project implementation, and provide technical assistance to inform specific elements of plans and projects. The Regional Teams should work across disadvantaged, low-income, rural, and tribal communities as well as communities of color to identify shared needs, priorities, challenges, and strategies that can be addressed by policy strategies at the local, school district, county, and regional scale. The Regional Teams should include entities that can reflect the variety and diversity exhibited within regions (i.e., a region that contains both rural tribal projects and urban projects in the same general geographic region will have varying needs that may not be adequately addressed by one entity). Given the available funding, Regional Teams should be scaled to first focus on the project areas of the Planning, CMIS, and STEP awardees.

IV. Available Funding

Each FY, CARB staff submits a proposed funding plan to the Board for approval that serves as the blueprint for expending Greenhouse Gas Reduction Funds, Air Quality

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Improvement Program, and other funds appropriated to CARB in the State budget for Low Carbon Transportation and related investments. The annual funding plan establishes CARB's priorities for the funding cycle, describes the projects CARB intends to fund, and sets funding targets for each project. Funding is provided for projects that support evolution through three phases of technology advancement: demonstration, commercialization, and transition to widespread deployment.

For the Low Carbon Transportation Investments FY 2022-23 Funding Plan, CARB currently has \$5 million available for the PCB Administrator. A single PCB Administrator will be selected through this competitive Solicitation. The PCB Administrator is responsible for distributing \$3 million of the \$5 million to community-based Planning awardees for planning and capacity building projects selected by CARB through a separate RFA process, as described in the Background section of this Solicitation. The remaining \$2 million is intended for the PCB Administrator's implementation activities, consisting of capacity building, administrative, and project implementation support to all Planning, CMIS, and STEP awardees and their partners implementing projects selected by CARB through a separate RFA process.

The Grant Term for the Grant Agreement (Grant or Grant Agreement) between CARB and the PCB Administrator will be from the date of full grant execution through **March 15, 2027**. CARB retains the option to extend the Grant Agreement term and funding if future funding becomes available. The PCB Administrator understands and agrees that there is no guarantee that additional CARB Funds will be awarded or that the Grant Agreement will be extended.

V. Application Process

Applications require a significant amount of up-front work. Well-thought-out applications help CARB ensure that selected and funded project will address the capacity building needs of community-led project awardees, among other priorities outlined in [Project Objectives and Vision](#).

The application requires a fully developed budget, partnerships, and timelines, among other application elements outlined in **Appendix A**. Lead Applicants must submit their applications using the Application Templates found in Appendix A. CARB will evaluate applications for eligibility and then score the applications. CARB will award funds based on the process described in the [Selection Process and Scoring Criteria](#) section.

VI. Timeline

During the Solicitation, CARB will host multiple Question and Answer (Q&A) sessions to answer questions about the Solicitation (see Q&A Sessions section) and will provide an opportunity to email questions to CARB before each session. CARB must receive complete applications by **11:59 pm (Pacific Time) on September 22, 2023 (the Application Deadline)**.

Grant Agreements must be fully executed by the Grantee and CARB no later than May 15, 2024. The PCB Administrator must plan all work to be completed (including a Final

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Report) and all final disbursement requests for reimbursement must be received by CARB no later than March 15, 2027, to ensure adequate time for processing prior to the end of the fiscal year. All Planning and Capacity Building Project Administrator funds must be expended within the Grant Term.

Timelines are subject to change at CARB's sole discretion.

Table 1. Solicitation Timeline

Milestone	Date	Time (Pacific Time)
Release of Solicitation	July 24, 2023	
Q&A Session #1 Question Submission Deadline	August 14, 2023	12:00 pm
Applicant Q&A Session #1	August 17, 2023	2:00 pm
Q&A Session #2 Question Submission Deadline	August 31, 2023	12:00 pm
Applicant Q&A Session #2	September 6, 2023	2:00 pm
Application Deadline	September 22, 2023	11:59 pm
Notification of Missing Proof of Eligibility	September 26, 2023	
Deadline to Update Proof of Eligibility	September 28, 2023	11:59 pm

Table 2. Grant Timeline

Milestone	Date
Preliminary Grantee Selection	October 30, 2023
Draft Grant Agreement to Grantee	November 13, 2023
Draft Grant Agreement returned to CARB	December 11, 2023
Grant Agreement Ready for CARB Final Review	February 12, 2024
Grant Agreement Executed & Grant Term Starts	May 15, 2024
Draft Final Report to CARB	December 31, 2026
Grant Term Ends & Final Report and Final Disbursement Request Deadline	March 15, 2027

VII. Terms and Definitions

The terms defined below will be bold the first time they are used in the remainder of the document.

Applicants: Term used to refer to the Lead Applicant and all Sub-applicants.

Capacity building: The process of strengthening local coordination, leadership, knowledge, skills, expertise, and access to resources. For this Solicitation, the goal of capacity building is to help develop or increase the ability of disadvantaged and low-income communities, including tribal communities, to understand and analyze transportation needs based on their own unique context and lived experiences, identify transportation priorities, access funding, advocate for equitable planning and implementation processes, and equitably implement clean transportation projects in

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the future. Example capacity building activities are listed in Table 3 of the [Eligible and Ineligible Activities and Costs](#) section.

Community-based organization: A nonprofit organization (as defined below) that is place-based and representative of a community or significant segments of a community and provides educational or related services to individuals or other organizations in the community.

CMIS and STEP awardees: Recipients of funding through the CMIS and STEP RFA issued by CARB as part of the Low Carbon and Transportation Investments FY 2022-23 Funding Plan. The PCB Administrator will provide capacity building, administrative, and implementation support the CMIS and STEP awardees and their project partners.

Direct costs: Actual costs incurred that are directly tied to the implementation of the project, including, but not limited to, personnel costs (i.e., hourly wage), subcontracts, equipment costs, and travel expenses. Profits, profit sharing, shareholder interest, bonuses, and taxes (real and personal) are NOT reimbursable as direct or indirect costs. Allowable costs are paid on a reimbursement basis only except where all advance pay requirements have been satisfied as set out in this Solicitation.

Disadvantaged community: Areas that experience disproportionate amounts of pollution, environmental degradation, and socioeconomic and public health conditions, identified as disadvantaged by the California Environmental Protection Agency per Senate Bill 535. Disadvantaged communities include the top 25 percent of census tracts in CalEnviroScreen 4.0, census tracts lacking overall scores in CalEnviroScreen 4.0 due to data gaps but receiving the highest five percent of CalEnviroScreen 4.0 Pollution Burden composite scores, census tracts identified in 2017 as disadvantaged regardless of their scores in CalEnviroScreen 4.0, and lands under the control of federally recognized tribes.¹¹

Grant Term: The time period identified in the fully executed Grant Agreement, in which all CARB Grant Funds must be spent, and all project activities completed.

Indirect costs: Indirect costs are actual costs incurred for services or activities that are not directly tied to a specific project objective but support a common or joint purpose. Allowable indirect costs are a pro rata share of general management (overhead) costs for operations that support the work performed under the Grant Agreement, such as accounting, budgeting, payroll preparation, personnel services, utility costs, rent and centralized data processing not already identified or reimbursed as a direct cost. Profits, profit sharing, shareholder interest, bonuses, and taxes (real and personal) are NOT reimbursable as direct or indirect costs. Indirect costs shall NOT exceed five (5) percent of the total CARB Grant Funds awarded. Allowable costs are paid on a

¹¹ <https://www.caclimateinvestments.ca.gov/priority-populations>

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reimbursement basis except where all advance pay requirements have been satisfied as set out in this Solicitation.

Lead Applicant: The local government, public institution of higher education, tribal government, or nonprofit organization that is responsible for leading the development of the application under this Solicitation. The Lead Applicant becomes the Grantee if their application is selected for funding under this Solicitation. Within this Solicitation the titles Lead Applicant, Grantee, and PCB Administrator are interchangeable.

Local government: A local public entity as defined in Section 900.4 of the California Government Code, which includes any local California county, city, district, public authority, public agency, and any other political subdivision or public corporation in the State but does not include the State. By way of example and not limitation, this includes, councils of governments, metropolitan planning organizations, air districts, and local education agencies.

Low-income community: Census tracts with median household incomes at or below 80 percent of the statewide median income or below the threshold designated as low-income by the Department of Housing and Community Development.¹²

Nonprofit organizations: Any nonprofit corporation qualified to do business in California, registered with the California Secretary of State, qualified pursuant to subdivision (c)(3) under Section 501 of the Internal Revenue Code, and tax exempt under California state law. For the purposes of this Solicitation, nonprofit organizations must have at least one year of incorporation as a nonprofit organization under Section 501 of the Internal Revenue Code, be in active/good standing with the California Secretary of State and have an office or at least one full-time staff person based in California. Certain nonprofits that are tribally chartered corporations under tribally enacted laws may be exempt from registration with the California Secretary of State.

Organizational capacity building: Strengthening an organization's effectiveness at accomplishing their mission and ability to initiate and sustain change. Opportunity areas of growth may be related to governance and administration (i.e., staff hiring and retention), resource development including financial and grant management, community connections by strengthening relationships, leadership skills, influence in community, and learning from practice, etc.

Planning awardees: Recipients of funding through the Planning and Capacity Building RFA issued by CARB as part of the Low Carbon and Transportation Investments FY 2022-23 Funding Plan. The PCB Administrator will directly administer, execute agreements with, and oversee the \$3 million in funds allocated to Planning awardees. The PCB Administrator will also provide capacity building and implementation support

¹² <https://www.caclimateinvestments.ca.gov/priority-populations>

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to the Planning awardees and their project partners.

Project team: The strategic and manageable partnership structure between the PCB Administrator and other implementing partners, assembled to carry out the required activities of this Solicitation, including but not limited to facilitating a regional approach to capacity building, administrative, and implementation support to Planning, CMIS, and STEP awardees. Cumulatively the partnership structure should represent all the necessary skillsets, expertise, and diverse perspectives needed to provide local, context-specific support and guidance to tribal, disadvantaged, and low-income communities.

Public institution of higher education: Includes the three public segments of California's higher education system – the University of California, the California State University, and the California Community Colleges.

Resource contributions: Cash match, in-kind services, and leveraged funding from other public or private sources to contribute to funded projects and support their quality, breadth, and longevity within and beyond the Grant Term.

Sub-applicant: An entity that enters into a partnership with the Lead Applicant for the purpose of applying for a CARB grant and that is responsible for implementing components of the project funded through CARB. Sub-applicants will enter written agreements with the Lead Applicant if their application is selected for funding.

Transportation equity: Occurs when the transportation system addresses unique transportation barriers; shifts decision-making power to the communities the system serves; and improves the quality of life for low-income people, people of color, and residents of communities disproportionately impacted by air pollution or who lack access to housing, jobs, and services.

Tribal government: All California Native American Tribes. Either a federally-recognized California tribal government listed on the most recent notice of the Federal Register, or a non-federally recognized California tribal government, including those listed on the California Tribal Consultation List maintained by the California Native American Heritage Commission.¹³

¹³ <http://nahc.ca.gov/>

Eligible Applicants and Partnership Structure

Each application must include partnerships between a **Lead Applicant** and **Sub-applicants**. It is important that these entities, representing different interests and expertise, work together to collectively develop and implement robust planning and **capacity building** capabilities that can adequately support a diverse set of projects with awardees that have varying capacity, administrative, and implementation needs.

Lead Applicants and Sub-applicants must comply with all relevant State laws, regulations, policies, procedures, the FY 2022-23 Funding Plan, and this Solicitation.

NOTE—PLEASE READ: Members of CARB advisory groups cannot be Lead Applicants, Sub-applicants, contractors, subcontractors, consultants or members of the Project Team; cannot provide letters of support or references; cannot be signatories to the Grant Agreement or any other related contracts; cannot be listed as any of the persons completing tasks in the scope of work; cannot have any role in or influence over this Solicitation or the application review or selection process; and, cannot communicate with CARB regarding CARB’s decision on the applications received. If a CARB advisory group member makes any prohibited appearance or communication subject to Government Code section 87104 as described above, the application will be disqualified and will not be eligible for an award.

To avoid real or perceived conflicts of interest the Lead Applicant (including its Sub-applicants, contractors, subcontractors, consultants, members of the Project Team, affiliates, employees, representatives, and officers) will not be eligible to be a Planning, CMIS, or STEP awardee or funding recipient for any project selected for funding for the length of their agreement. Additional conflict of interest evaluation by CARB may be appropriate depending on the specific project.

I. Lead Applicant

Each application must have a single Lead Applicant. The Lead Applicant’s application selected for funding will enter into a Grant Agreement with CARB and assume responsibility and accountability for the use and expenditure of received CARB Grant Funds. CARB will not enter into contractual or other written agreements with any other named Sub-applicants, partners, collaborators, affiliates, contractors, consultants, or subcontractors. After the Grant Agreement is executed, the Lead Applicant becomes the Grantee. The PCB Grantee is responsible for contracting and working with all Sub-applicants, subcontractors, etc. to implement the Scope of Work as set out in the executed Grant Agreement.

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Lead Applicants must be California-based¹⁴ and have experience providing community-based capacity building, administrative, and implementation support. Eligible Lead Applicants may be any of the following types of entities (see [Terms and Definitions](#) for additional examples of the entities listed below):

- **Local government**
- **Public institution of higher education**
- **Tribal government¹⁵**
- **Nonprofit organization**

II. **Lead Applicant Qualifications**

Lead Applicants must provide sufficient information in their application to demonstrate their management and financial capacity to lead this effort. Lead Applicants must address the following capacities, experience, and expertise (with examples):

- The staff and resources to serve as an administrator that can implement a statewide project. Lead Applicant can commit existing staff or can demonstrate that they plan to hire the needed staff to satisfy the [Scope of Work](#) (inclusive of all project milestones and deadlines). The Lead Applicant should also demonstrate that they have implemented and developed resources for similar efforts.
- Ability to leverage existing resources to implement this project.
- Access to organizational management, facilitation, and other resources.
- Ability to follow the disbursement processes outlined in this Solicitation, which includes submitting quarterly invoices to CARB, ensuring prompt payments to partners, and meeting all other milestone/reporting timelines.
- Ability to receive State funding and enter into contractual agreements with third parties.
- Ability and readiness to conduct equity work in communities through a documented commitment to equity (i.e., resolution, action plan, etc.) with a clear vision. Lead Applicants must have an organization mission that aligns with equitable access to clean mobility transportation.
- Previous experience and/or demonstrated ability to manage complex grants

¹⁴ For the purposes of this solicitation, California-based means that eligible **Applicants** each have at least one office located in California.

¹⁵ A tribal government must engage in negotiations with CARB to develop and execute a limited waiver of sovereign immunity agreeing to the personal and subject matter jurisdictions of state court and, at minimum, compliance with state construction standards and regulations.

and coordinate amongst diverse partners.

III. Partnership Structure

The application should include a strategic and manageable partnership structure with multiple organizations to facilitate a regional approach to capacity building, administration, and implementation support and ensure all the necessary skillsets, expertise, and diverse perspectives needed to provide local, context-specific support and guidance to, and ensure representation of **disadvantaged and low-income communities**. As a capacity building project, guidance to and representation of tribal and rural communities as well as communities of color is essential.

Sub-applicants as well as other project partners are referred to collectively as the **Project Team**.

Sub-applicants must be California-based and may include public, private, or nonprofit organizations, including but not limited to:

- **Community-based organizations**¹⁶
- Consultants
- Grassroot organizations
- Healthcare services and providers
- Local government
- Nonprofit organization
- Philanthropic organizations and foundations
- Private companies
- Public institution of higher education
- Public schools (as identified by the California Department of Education)
- Small businesses
- Tribal government
- Vocational schools

The Project Team should include experts in the field of equitable transportation planning and **transportation equity** with the necessary competencies to build organizational and community capacity based on community context and needs in the transportation sector as well as related sectors, such as public health and workforce

¹⁶ For Sub-applicants, if the community-based organization is an unincorporated nonprofit, they must have a contract with a fiscal sponsor who is tax-exempt with the Internal Revenue Service under Internal Revenue Code Section 501 and tax-exempt under California state law. The fiscal sponsor must be registered in active/good standing with the California Secretary of State to perform financial management and administrative functions on their behalf.

training and development.

The Lead Applicant must disclose all members of the Project Team identified at the time of application. Sub-applicants as well as other implementing partners must have written signed contracts or agreements with the Grantee in place for their work on the project at the time of project implementation and must comply with CARB's Grant Agreement terms along with the Lead Applicant. The Grantee's Grant Agreement with CARB must be referenced in, incorporated into, and made part of the written agreement between Sub-applicants and the Grantee. The Lead Applicant must provide details of the partnership structure within the application. The Project Team identified at the time of application must each provide signed letters of commitment and support (addressed to the Lead Applicant) demonstrating their commitment to the proposed project, their ability to fulfill their identified roles, and their commitment to equity and partnership.

For member of the Project Team that haven't been identified yet, Lead Applicants must provide information about the roles and their specific qualifications as well as process for filling the role. Project Team additions added during the **Grant Term** are subject to advance written approval by CARB.

IV. Project Team Qualifications

Collectively, the Project Team must possess the following capacities, experience, and expertise (with examples):

- Equitable transportation, sustainable community planning and design, land use, shared mobility, spatial analysis, and data analysis and visualization.
- Implementation support, including supporting financial sustainability best practices; the development of outreach materials, reaching hard-to-reach community members; inclusive community engagement.
- Transportation equity in general and the ability to develop and implement equitable processes and applying environmental justice principles.
- Quantitative and qualitative research, evaluation, and data collection and analysis (e.g., focus groups, surveys, successful use of data analytics and metrics tools, equity analysis, etc.).
- Leading or collaborating with public agencies, school districts, and nonprofit groups on multiple plans, projects, programs, and training on equity and environmental justice, equitable outreach and engagement, zero-emission mobility, and active transportation master planning.
- Developing, implementing, and administering equity-based capacity building programs.

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- Prior experience working with tribal, rural, disadvantaged, and low-income communities (preferred lived experiences or deep knowledge of the experiences of people of color and residents of communities disproportionately impacted by air pollution or who lack access to housing, jobs, and services).
- An understanding of and an ability to respond to the power dynamics in the context of relationship building with community partners as demonstrated through prior work.
- Facilitating peer-to-peer learning, and experience in conducting workshops, training, and other educational events.
- Experience working with a variety of entities implementing zero-emission mobility projects, planning or capacity building efforts, particularly school districts, tribal governments, and community-based organizations.

Scope of Work

This section describes the expectations and the minimum duties of the PCB Administrator upon Grant Agreement execution and will be incorporated into the Grant Agreement. These activities are not required to be completed as part of the application in response to this Solicitation, but Lead Applicants must describe within their application their approach and ability to complete these tasks in the Scope and Timeline Workplan Template (Workplan) within Appendix A. The Workplan must include a detailed narrative of proposed activities, including proposed additions to the minimum duties outlined in this Solicitation, approach, milestones/deliverables, and timeline for each task. The Workplan will be evaluated based on content, completeness, and overall implementation strategies.

In general, and under CARB guidance, the PCB Administrator is responsible for the day-to-day administration and oversight of Planning awards and providing **Planning awardees** capacity building and implementation support through the Grant Term. The PCB Administrator is also responsible for providing capacity building and implementation support to CARB-selected **CMIS and STEP awardees**. The PCB Administrator is not responsible for day-to-day administration of CMIS and STEP awards but will provide some administrative support in coordination with CARB. Lead Applicants should elaborate on the design and approach for carrying out a regional approach to project implementation.

The PCB Administrator is responsible for building equity into each task, including but not limited to establishing transparency and accountability for project implementation; facilitating changes/refinements to the project scope of work, partnerships, etc. through decision-making strategies involving the Project Team and Planning, CMIS, and STEP awardees; and developing approaches that support ongoing capacity-building beyond the Grant Term for awardees. This may also include providing information publicly and to key stakeholders at multiple points in the project cycle and making sure that lessons, challenges, and areas where more funding/emphasis is needed are clear to support future projects or project expansion. Through implementation of this effort, it is particularly essential that the PCB Administrator update and adapt approaches based on recommendations from third-party research evaluations of equity efforts as well as lessons learned.

Below describes the tasks required under this Solicitation. In the Workplan, Lead Applicants must identify Task 1 as "Grant Management." All other tasks may be structured based on the Lead Applicant's project need and preferences but must contain the minimum duties as described below. In addition, all proposed changes are subject to CARB's sole approval, and pending acceptance, the Grant Agreement will reflect these changes.

Grant Management

This is an administrative task that shall only be used by the PCB Administrator for administration of this project. Costs for grant management activities cannot exceed

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five (5) percent of the CARB Grant Funds. The PCB Administrator will manage the Grant according to the terms and conditions of the fully executed Grant Agreement and this Solicitation. PCB Administrator administrative duties include, but are not limited to:

- a. Kick-Off Meeting with Project Team and relevant CARB staff to clarify roles and responsibilities, discuss timeline, and outline expectations for project deliverables and procedures.
- b. Regular coordination with CARB. Given the fast-paced nature of supporting Planning, CMIS, and STEP awardees, it will be important for the PCB Administrator and CARB to meet twice a month. Frequency may be more or less, based on need, and as agreed upon between CARB and the PCB Administrator. Includes meeting preparation materials (such as agendas, presentation materials, etc.) and meeting notes.
- c. Regular coordination with the Project Team. Facilitate communication among the Project Team and hold a minimum of monthly team meetings to coordinate on project implementation and share support strategies.
- d. Finalize and implement the Project Implementation Plan, including obtaining CARB review and approval of the plan. The Implementation Plan shall include the project schedule, project deliverables; data collection, evaluation, and reporting plan; internal procedures, communication, and partnership agreement/structure plan; a plan for the regional approach to technical assistance; and the awardee technical assistance process and plan. All modifications of the Project Implementation Plan are subject to review and approval by CARB in advance of any changes.
- e. Establish and maintain accurate and detailed project records for each aspect of implementation.
- f. Prepare project quarterly reports, beginning three months after the Grant Agreement is executed. Coordinate the development of quarterly status reports with all members of the Project Team. Reports should contain at minimum: task progress; hours of support provided to each Planning, CMIS, and STEP awardee; challenges and barriers supporting community-led projects and with the overall implementation of the planning and capacity building project; and lessons learned. Draft quarterly reports must be submitted for review and approval by CARB.
- g. Develop the Draft and Final Report, in coordination with the Project Team, that comprises a user-friendly and comprehensive assessment of the activities conducted as part of the Grant. A draft report must be submitted at least three months before the project end date for CARB review and approval. Coordinate with the Project Team and gather information for the report from Planning, CMIS, and STEP awardees. Recommendations and lessons learned in the report will be used to improve the administration of CARB's clean mobility equity investments in future cycles.

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- h. Document, track, and report expenditures of CARB Grant Funds (including funds distributed to the Project Team), and **resource contributions**.

Administration of Planning Grants

The PCB Administrator will administer Planning awards selected by CARB through a separate RFA. This task relates to all administrative activities, including oversight and accountability for each selected Planning award to ensure compliance with the requirements consistent with the RFA package and Planning awardee commitments outlined in their respective applications, and will include:

- a. Developing a policies and procedures plan, with flow charts and graphics as applicable, that describes the administrative process for all components of administering Planning awards, including, but not limited to executing awardee agreements, onboarding and administrative support, implementation support, and payment request and disbursement process. Developing all necessary materials and tools to prepare to implement these processes.
- b. Developing and executing agreements with Planning awardees by July 15, 2024, as feasible, using the Planning awardee agreement template provided by CARB (and part of the Planning RFA). Managing and overseeing the executed Planning award agreements through the Grant Term.
- c. Disbursing funds to Planning awardees. As part of this, developing an expeditious process to review disbursement requests (to ensure they are complete and contain the necessary documentation), approve, and make funds available to Planning awardees quickly.
- d. Reviewing and approving bi-annual status reports, project implementation schedule and plans (such as community engagement, data collection, etc.), final reports, presentations, community engagement materials, and all other required deliverables.
- e. Maintaining and securing financial information, including expenditure tracking, and project records of Planning awardee funds. Protecting all personally identifiable information as it relates to financial records.
- f. Supporting the Planning awardee **organizational capacity building**, particularly grant management training, budgeting, and hiring/retaining staff.

Implementation Support to Planning, CMIS, and STEP Awardees

This task includes developing a regional, place-based, and context-specific approach to providing implementation support to community-based and school-community project awardees. Provide support to Planning, CMIS, and STEP awardees as they plan for, implement, and evaluate projects. Support will vary for each project, will require varying levels of CARB coordination, and may include:

- a. Designing a regional approach to providing awardees with capacity building, administrative, and implementation support. Describe processes and approaches to coordinate directly with the Regional Teams.

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- b. Developing a policies and procedures plan, with flow charts and graphics as applicable, that describes the process for designing and developing implementation support options for each awardee. Establishing systems to manage, review, track, and monitor project deliverables for each Planning, CMIS, and STEP awardee. As needed, setting up project management software, web tools, etc. and training the Project Team and awardees, as applicable, in the use of the platform. Compiling and storing project deliverables.
- c. Conducting a readiness assessment with each Planning, CMIS, and STEP awardee and their partners to understand the implementation support needed for each project. Develop an implementation support plan for each Planning, CMIS, and STEP project that describes focus areas, communication preferences, etc.
- d. Maintaining regular communication (e.g., email, virtual or in-person check-ins, office hours, etc.) and maintaining communication records (including but not limited to meeting materials, agendas, and notes).
- e. Supporting development of and reviewing project deliverables (e.g., status reports, project implementation plans, outreach and engagement plans, public-facing outreach materials, data collection plans), and creating tools in coordination with CARB to support project deliverable development (e.g., new or updates to existing guidance, templates, training, and other materials).
- f. Developing topic-specific implementation support for overall grant management, as well as financial sustainability/long-term planning and designing data collection methods.
- g. Supporting strategic planning, community-led processes, and development of equitable community engagement, governance structures, conflict resolution and mediation, technology solutions.
- h. For CMIS and STEP awardees, pre-reviewing all disbursement requests to ensure requests are complete and contain necessary documentation before the CMIS or STEP awardee submits the request to CARB. (CARB will approve and disburse payments to CMIS and STEP awardees, but the PCB Administrator will approve and disburse payments to Planning awardees.)
- i. Facilitating peer-to-peer engagement, learning, networking, and regional project coordination to build the capacity of awardees and the broader community participating in the projects. Participating in the Clean Mobility Equity Alliance and promoting awardee participation.
- j. Supporting long-term organizational capacity building (such as grant management, workforce training and development practices, preventing displacement, operationalizing equity) and community capacity to sustain and expand successful mobility project implementation and financial sustainability practices into the future through the compilation and development of capacity building resources and activities. Support efforts to pursue grant funding and

inform further capacity building work beyond awardee grant terms.

Data Collection, Evaluation, and Reporting

Collect, evaluate, and report all data to CARB relating to PCB Administrator activities. Create a data collection, evaluation, and reporting plan that includes the following components:

- a. **Data collection:** Collect data on the project at a frequency agreed upon by CARB and the awardees. Set up a process by which the Project Team and Planning awardees report data on project implementation to the PCB Administrator for compilation.
- b. **Data evaluation:** Regularly evaluate project impacts based on identified metrics of success. Regularly update processes and project implementation based on evaluation results. Some metrics of success are defined by CARB (e.g., jobs supported, etc.). Others should be identified for each project through collaboration with CARB, the Project Team and Planning, CMIS, and STEP awardees. Metrics may be qualitative and/or quantitative.
- c. **Data reporting:** Report data semi-annually to CARB. The data reported may vary in frequency and type based on the project funded and will be finalized in coordination with CARB after awardee project selection.

Potential Future Tasks (with the addition of future FY funding)

If CARB receives more funds, they may be added to this project to support future tasks, such as the tasks listed below. Lead Applicants are expected to include these activities in their Workplan and include a general approach on how these activities would be implemented should additional grant funds be awarded and the Grant Agreement amended. Lead Applicants are not required to provide a budget for these activities at this time. This does not guarantee future funds will be awarded.

- a. Capacity building support for Lead Applicants that did not receive funding through the FY 2022-23 Planning, CMIS, and STEP RFA.
- b. Support CARB on updating Planning, CMIS, and STEP RFAs or funding processes.
- c. Outreach to support future Clean Mobility Investment solicitations.
- d. Application support for future Clean Mobility Investment solicitations.
- e. Administering additional CARB-selected Planning awards.

Eligible and Ineligible Activities and Costs

This section identifies eligible and ineligible activities and costs intended to support project implementation. Generally, the activities chosen for project implementation must focus on building capacity as well as administrative and project implementation support. The budget for these activities may not exceed \$2 million of the available CARB Grant Funds. Lead Applicants must ensure that the costs proposed in the project budget are eligible for funding.

I. Eligible Projects

The example activities provided in Table 3 are all based on community needs identified through lessons learned and public feedback. Lead Applicants are not expected or required to select from the example activities provided; however, applications must provide justification for their proposed activities and relevance based on the Project Team’s experience and expertise.

Table 3. Planning and Capacity Building Activities

Category	Example Activities
Community outreach, engagement, and capacity building technical assistance	<ul style="list-style-type: none"> • Educational resources for clean transportation (e.g., curricula, videos, mobile apps, training) • Event planning and logistics support • Meeting facilitation and the support of equitable power dynamics • Partnership, relationship building, and network development, including but not limited to parent teacher organizations and student transportation networks • Regional resource centers for clean transportation education and outreach • Resource portals, toolkits, and documents • Translation/interpretive services and materials • Training on various forms of community decision-making (e.g., participatory budgeting, lottery-selected panels)
Administrative and implementation technical assistance	<ul style="list-style-type: none"> • Budgeting support • Developing guidance on best practices • Development of plan templates (outreach and engagement, data collection, long-term sustainability, etc.) • Equitable implementation planning • Grant management training and skill building • Guidance in goal setting and project strategizing • Forums to discuss implementation challenges and solutions • Resource libraries including vehicle/micromobility device libraries to support demonstrations and events

Category	Example Activities
	<ul style="list-style-type: none"> • Peer-to-peer learning • Support in centering community perspectives in all phases of community-led project implementation • Support in convening community partners • Survey development, information gathering, and guidance on other data collection methods
Organizational capacity building technical assistance	<ul style="list-style-type: none"> • Career and technical education support • Conflict resolution and mediation • Creating learning opportunities centered on statewide policies • Financial sustainability (including seeking philanthropic funding, loans, etc.) • Grant writing and grant budget development • Improving data analysis understanding • Leveraging community assets and supporting the development of clean transportation project models that address community needs • Long-term training and skills development including but not limited to grant management and data collection • Project design and transportation equity goal setting support • Providing connections to other public entities (and other partnership development activities)

The examples provided in Table 2 are not exhaustive. Other project types not listed may be funded through this Solicitation, at CARB’s discretion. Activities must:

- Meet applicable State laws.
- Support increasing transportation equity.
- Support community and awardee capacity building.
- Support awardees with project-specific administrative and implementation needs.

CARB recommends that **Applicants** ask about other activities they are interested in during Q&A sessions to avoid proposing project categories or activities that CARB may deem ineligible.

II. Eligible Costs

Eligible **direct and indirect costs** that may be covered by CARB funding include:

- Access to proprietary data or research materials (subject to CARB approval)
- Direct travel costs (travel reimbursement must adhere to the State rates and conditions established on the California Department of Human Resources

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(CalHR) website¹⁷ with the exception of out-of-state travel, which is not eligible unless explicitly approved by CARB.

- Engagement, outreach, education, and training, including, but not limited to:
 - Language translation and interpretation services
 - Marketing and advertisements
 - Participant incentives that are an exchange for services or information and are appropriately documented
 - Public transit subsidies for participants with accessibility or transportation challenges
 - Rental costs of equipment, facilities, or venues (Applicants are encouraged to seek access to free or low-cost facilities through partnerships with community facilities where possible)
- Grant management costs (including indirect costs) necessary to fulfill the [Scope of Work](#) in this Solicitation, including but limited to:
 - Management oversight
 - Prorated office space
 - Prorated general liability, Workers' Compensation, and automotive insurance
- Labor, including but not limited to:
 - Salaries, wages, and stipends for staff dedicated to the project (excluding bonuses, profit sharing, or anything not otherwise allowed by applicable laws)
 - Staff training
- Materials and supplies, including but not limited to:
 - Language translation services
 - Preparation of materials
 - Printing and mailing
- Purchase or lease of vehicles and equipment exclusively for demonstration, instructional, or outreach purposes and associated operations and maintenance costs (all subject to the Project Eligibility Requirements detailed in the CMIS and STEP grant RFA¹⁸), including but not limited to:
 - Costs to outfit vehicles, equipment, and infrastructure with necessary and appropriate workplace and safety equipment
 - Insurance (for vehicle and for rider or passenger)
 - Light-, medium-, and heavy-duty zero-emission vehicles
 - Micromobility devices (e.g., standard bicycles, electric bicycles, electric

¹⁷ <https://www.calhr.ca.gov/employees/pages/travel-reimbursements.aspx>

¹⁸ <http://www.arb.ca.gov/msprog/aqip/solicitations.htm>

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- scooters, tricycles, hand-pedaled cycles, recumbent bicycles)
- Mileage and user tracking devices (i.e., data loggers or telematics, bike and walk count equipment)
- Neighborhood electric vehicles
- Repairs, repair tools, and routine maintenance
- Safety and training courses
- User safety equipment (e.g., helmets for bicycle sharing participants)

III. Ineligible Costs

Costs that are ineligible for CARB funding include, but are not limited to:

- Advocacy work, such as direct lobbying for the passage of specific bills or local propositions
- All costs associated with enabling non-shared automobile or motorcycle parking, including but not limited to parking fees and the addition or rent of parking spaces or structures
- Building permits and site approvals
- Ceremonial expenses
- Child-related costs
- Collateral on any debt or loan, payments on any debt or loan, or use of funds as an asset to secure financing, refinancing, a loan, or a line of credit
- Commission fees, commissions, bonuses, and bonus payments of any kind
- Costs that occur outside the Grant Term, including for work completed before Grant Agreement execution and ongoing operational costs after the Grant Term
- Cost-sharing for infill development
- Damage judgments arising from the acquisition, construction, or equipping of a facility, whether determined by judicial process, arbitration, negotiation, or otherwise
- Donations
- Environmental studies, plans, or documents normally required for project development under the National Environmental Policy Act or California Environmental Quality Act (CEQA)
- Food and beverages
- General meeting that do not specifically discuss or advance implementation of the CARB-funded project
- Grant management costs in excess of five (5) percent of the awarded grant funds
- Indirect costs in excess of five (5) percent of the awarded grant funds
- Land or building acquisition, leasing, or renting, except for parking space purchase or lease
- Litigation costs, attorney fees, or lobbying

- Local, state, or federal taxes
- Mitigation activities that are already mandated by local or State governing bodies or agencies
- Out-of-state travel, unless explicitly approved by CARB
- Payment for any civil or criminal penalties or fines or to address, correct, or mitigate any past, present, or future violations or any alleged violations of law
- Payment of liens or to satisfy a judgment
- Profit or profit-sharing
- Publicity expenses unrelated to the CARB-funded projects
- Real estate brokerage fees or expenses
- Referral fees
- Services, materials, or equipment obtained under any other State program
- Stewardship of legal defense funds
- Travel that does not adhere to the State rates and conditions established by CalHR

Grant Management and Budget

I. Grant Management

Lead Applicants should ensure that they have the staff capacity and budget to support grant management for the life of the Grant Term. Grant management activities are further described in the [Scope of Work](#).

After the Grant Agreement is executed, the Grantee must execute written agreements with each of their Sub-applicants. Fully executed subcontracts must be in place before the Sub-applicant can incur any costs for which the Grantee will seek reimbursement, so it is important to execute subcontracts as soon as possible. These written agreements will govern the work completed by each partner. Lead Applicants are encouraged to extend these written agreements, as well as the partnership agreement and other plans outlined below beyond the Grant Term to support long-term sustainability of this effort. However, all CARB Grant Funds must be spent within the Grant Term.

The Grantee must work with the Project Team to develop an overall Project Implementation Plan. This plan will include multiple parts, including:

- Project schedule and deliverables
- Internal procedures, communication, and partnership structure plan
- Data collection, evaluation, and reporting plan
- Regional technical assistance process implementation plan
- Partnership agreement

The Project Implementation Plan will serve as a detailed blueprint of the scope of the overall grant and will be reviewed and approved by CARB. It is meant to be a useful tool for the Grantee, CARB, and the Project Team to plan, understand, and refer to for details of the agreed upon work. The plan may be developed over time as different parts become relevant. For example, the partnership agreement should be developed within three months of grant execution (the earlier, the better). The data collection, evaluation, and reporting plan should be developed before data collection is set to begin. The Grantee and Project Team should revisit the Project Implementation Plan consistently over the Grant Term and update it as needed within the bounds of the Grant Agreement scope.

The Grantee may request funds as reimbursements or in advance, assuming all advance pay requirements in the Draft Sample Grant Agreement in **Appendix B** are met, including CARB's Advance Pay regulation. However, CARB Grant Funds may not be advanced to anyone other than the Grantee; all other funding recipients must be paid on a reimbursement basis only per CARB's Advance Pay regulation¹⁹ and described in the [Advance Pay](#) section of this Solicitation. Grantees are encouraged to work with their partners and Planning awardees to plan a payment system that eases this burden, particularly for smaller community-based organizations. Sufficient documentation must be provided to support all disbursement amounts requested during project implementation.

II. Budget

A proposed budget is a required element of the application in **Appendix A**. Grant management costs may not exceed five (5) percent of the total requested funds. In addition, indirect costs may not exceed five (5) percent of the total requested funds. The budget must include a set-aside of at least \$3 million to fund Planning awardees.

Applicant's may provide resource contributions to cover project costs, but this is not required. CARB has no specific limitations on resource contributions, but any resource contributions must follow the requirements set forth in the funding source that they come from.

¹⁹ <https://ww2.arb.ca.gov/sites/default/files/barcu/regact/2019/advancepayment2019/fro.pdf>

Application Instructions

I. Application Submittal Process

Appendix A identifies all the required application elements including but not limited to narratives, documentation requirements, templates, and forms that must be submitted together as a complete application package. A complete application consists of all required elements including one (1) signed and completed Application Cover Page. For an application to be scored, the Lead Applicant must meet all [Eligibility Requirements](#) and submit all the required application elements.

Applications must be submitted electronically via email. **No oral, telephone, facsimile, mailed, or hand-delivered applications will be accepted.** Lead Applicants must send the complete application package by email to Violet.Martin@arb.ca.gov. CARB must receive complete applications by **11:59 pm (Pacific Time) on September 22, 2023 (the Application Deadline)**. If the application is too large to send in one email, Lead Applicants may submit different parts of the application in multiple emails and must include information in the body of the email about the number of emails that CARB should receive, so staff can confirm that CARB has received all parts of the application.

Lead Applicants will not be allowed to submit any additional records or materials after the application deadline. If a Lead Applicant needs to amend an application that has already been submitted, the Lead Applicant may do so by re-submitting a new completed application package by the application deadline—only the most recent application package will be considered by CARB.

Communications regarding this Solicitation will be conducted by email. Lead Applicants agree to provide a valid email address with the application package. CARB is not responsible or liable for email communications that do not make it to the intended destination. **All communications regarding a submitted application must come from the Lead Applicant and NOT from any of the Sub-applicants or other Project Team members.**

CARB will send a confirmation email to each Lead Applicant within 24 hours of receiving the electronic version of the application or on the next business day. Email is not instantaneous. Lead Applicants are encouraged to email their applications at least one day in advance of the deadline to avoid delays due to technical difficulties and ensure that their application has been received by the deadline. Applications received after the application deadline will be rejected and not scored.

All information and data submitted as a response to this Solicitation are the property of CARB and will become a public record.

II. Application Format Requirements

Applications must be accurate, brief, and clear. CARB recommends that all submitted

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files be clearly labeled and include the Lead Applicant Name and corresponding application attachment number. **Appendix A** includes some recommended naming conventions for application materials. Do not include any personally identifiable information in the application, such as home addresses, personal phone numbers, or personal email addresses. Business addresses, phone numbers, and email addresses are required.

III. Q&A Sessions

CARB will hold two Q&A sessions during the Solicitation period, at which time staff will be available to answer clarifying questions regarding the Solicitation process, eligibility, and anything else related to the current Solicitation. CARB will not answer questions regarding this Solicitation before or after the Applicant Q&A Sessions. The Applicant Q&A Sessions will be held at the dates and times listed below.

Q&A Session #1:

Date: August 17, 2023

Time: 2:00 pm (Pacific Time)

Webinar Registration:

https://us06web.zoom.us/webinar/register/WN_vouwdsUpRFWqTHg5jgQ1Og

Q&A Session #2:

Date: September 6, 2023

Time: 10:00 am (Pacific Time)

Webinar Registration:

https://us06web.zoom.us/webinar/register/WN_QiR9GQD3TOK3sOp9NikxjA

Q&A sessions will be open to all interested prospective Applicants. Participation in these meetings is optional but encouraged. Written questions submitted before each Q&A session will be given priority. Written questions should be sent to Violet.Martin@arb.ca.gov by 12:00 pm (Pacific Time) three business days prior to each Q&A session. Staff will only respond to questions regarding this Solicitation during the Q&A sessions.

The questions and answers regarding this Solicitation will be posted on the CARB website three business days after the Q&A session. This date may be extended at CARB's sole discretion.

CARB will not answer questions regarding this Solicitation outside of the Q&A sessions. Any verbal communication with a CARB employee concerning this Solicitation is not binding on the State and shall in no way alter a specification, term, or condition of the Solicitation.

IV. Eligibility Requirements

Applications submitted must meet the Eligibility Requirements listed in Table 3 before they are scored. Eligibility Requirements will be evaluated at CARB's sole discretion.

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CARB reserves the right, but not the obligation, to request clarification regarding application responses during the application review and scoring period.

If an application does not appear to meet all Eligibility Requirements or requires additional documentation, the Lead Applicant will have two business days to respond to CARB. The Lead Applicant will be notified by CARB by September 26, 2023, and will be required to submit proof that the Eligibility Requirements have been met by **11:59 pm (Pacific Time) on September 28, 2023**. Any updates during this time should not result in substantial changes to the application and only updates that are relevant to CARB’s request will be considered.

If all requirements are met (i.e., CARB staff answer “Yes” for each question in Table 4), the application will be scored using the scoring criteria in Table 5.

Table 4. Eligibility Requirements

Application Section	Eligibility Requirements	Yes/No
Overall	Is the application package complete, accessible (i.e., the files open), with all required dates/signatures and all required application elements identified in Appendix A ?	
Overall	Was the application received by the application deadline of 11:59 pm (Pacific Time) on September 22, 2023, to violet.martin@arb.ca.gov ?	
Budget	Is the total budget for implementation activities less than or equal to \$2 million?	
Budget	Has the Lead Applicant submitted a budget with at least \$3 million set-aside to fund CARB-selected Planning awardees?	
Lead Applicant	Is the Lead Applicant an eligible organization?	
Partnership Structure	Does the application include Sub-applicant(s), and did all Sub-applicants provide letters of commitment and support?	

V. Selection Process and Scoring Criteria

Applications will be evaluated using the scoring criteria in Table 5 provided below. CARB will create an evaluation team to evaluate all applications that may consist of CARB staff or staff of other California State entities. Applications will not be scored unless [Eligibility Requirements](#) are met.

The maximum score is 100 points. The qualified Lead Applicant with the highest overall score will be preliminarily selected as the Grantee. The preliminary selection of an application does not in any way commit CARB to approving or finalizing the grant. The selected funding recipient will be required to sign a Grant Agreement with CARB to fulfill the duties of the Grantee (see **Appendix B**). CARB, in its sole discretion, may cancel the preliminary selection and select the next highest-scoring project, and so on,

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until an agreement is reached, or exercise its right, in its sole discretion, to not award a grant. If, in CARB’s sole discretion, no submitted application meets the goals of this Solicitation no selection of a Grantee is required to be made and funding can be directed to another project identified in the Funding Plan as needed.

Table 5. Scoring Criteria

Scoring Criteria	Total Points Possible
Project Team Qualifications (45 points)	
Lead Applicant demonstrates the experience and expertise to successfully serve as a statewide administrator.	10 points
Lead Applicant demonstrates subject matter expertise needed to provide capacity building, administrative and implementation support and has a documented commitment to equity and partnership.	10 points
Lead Applicant demonstrates ability to implement equitable processes, manage complex grants, and coordinate amongst diverse partners.	10 points
Sub-applicant(s) demonstrates subject matter expertise needed to provide capacity building, administrative and implementation support and is committed to equity, and partnership. Letters of Commitment and Support demonstrate members will contribute their unique strengths and proven track records of serving communities.	15 points
Lead Applicant Resources and Readiness (10 points)	
The Lead Applicant has sufficient resources to administer Planning awards. The Lead Applicant demonstrates the ability to establish and adhere to realistic and expeditious timelines based on prior work examples and existing resources.	10 points
Proposed Budget (15 points)	
Budget is clear, easy to follow, and lists itemized costs.	2 points

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Scoring Criteria	Total Points Possible
<p>Budget is detailed, consistent, and provides justification for budgeted costs allocated to the tasks within the Lead Applicant’s Scope and Timeline Workplan and the requirements of this Solicitation. The Lead Applicant describes the types and amounts of grant management and indirect costs (which are minimized) and costs for project development and implementation (which are maximized). All resource contributions (i.e., match funding and in-kind support) are itemized in letters describing and authorizing contribution commitments (can be included in Letters of Commitment and Support if coming from Project Team).</p>	<p>8 points</p>
<p>Budget is feasible and reflects overall project objectives and program goals to successfully implement the project.</p>	<p>5 points</p>
<p>Scope and Timeline Workplan or Workplan (30 points)</p>	
<p>Lead Applicant provides a concise project description that effectively describes the project, approach, and how the project will build capacity to achieve more successful and equitable outcomes for the Planning, CMIS, and STEP awardees.</p>	<p>5 points</p>
<p>Lead Applicant demonstrates an understanding of equity and how to effectively implement equitable processes. Lead Applicant proposes equity strategies that will build long-term capacity for Planning, CMIS, and STEP awardees, and support awardees in achieving their project implementation equity goals.</p>	<p>5 points</p>
<p>The proposed strategy for implementing a regional approach is feasible and includes specific examples how it will provide local, context-specific capacity building, administrative, and implementation support. Approach is scalable and adaptable (i.e., flexible in both size, approach, and with the initial regions of focus). The approach incorporates a variety of solutions for the diversity found within regions.</p>	<p>5 points</p>
<p>The Lead Applicant’s plan and approach to develop a</p>	<p>5 points</p>

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Scoring Criteria	Total Points Possible
<p>timely and efficient process where all Planning awards will be under agreement and managed efficiently and effectively. Approach includes a project management tracking and reporting system and ensuring Planning awardees are managed in compliance with all Solicitation and RFA terms and conditions.</p>	
<p>Lead Applicant provides a Workplan that includes a description of activities and associated tasks, a timeline for completion of key tasks and deliverables, and Project Team members involved in implementing each task and subtask. Workplan provides sufficient description of tasks to provide reviewers with an understanding of how specific tasks advance objectives and goals. Timeline is feasible given complexity of tasks.</p>	<p>10 points</p>
<p style="text-align: right;">Total</p>	<p>100 points</p>

Post-award Process

The qualified Lead Applicant with the highest overall score will be preliminarily selected as the funding recipient. The selected funding recipient must then work with CARB to develop and complete the exhibits and attachments to the Grant Agreement. CARB, in its sole discretion, may make changes to the proposed project milestones, work plan, or disbursement schedules in consultation with the Lead Applicant, for inclusion in the Grant Agreement. Only CARB shall have the discretion to modify, amend or alter the Draft Sample Grant Agreement (Appendix B).

I. Scope of Work

Lead Applicants must consider the duties listed in Task 1 of the Scope and Timeline Template (**Appendix A**) and the requirements in the Draft Sample Grant Agreement (**Appendix B**) when developing their application, especially the timeline and budget. The Scope of Work that is submitted as part of the application will be included as the scope of the Grant Agreement. The Grant Agreement must be executed by May 15, 2024.

II. Requirements Prior to Execution of Grant Agreement

Once selected and prior to Grant Agreement execution, the selected funding recipient must submit a **Governing Board Resolution** from the selected funding recipient's governing board that commits the entity to do the following things:

- Comply with the requirements of the Grant Agreement
- Accept grant funds from CARB
- Allocate and authorize any resource contributions that the entity has committed as part of the application
- CARB also recommends the resolution allow for grant amendments without governing board approval.

Both the Grantee and CARB must sign (execute) the Grant Agreement before it can take effect. Signing the Grant Agreement will commit the Grantee to fulfilling the administrative and technical duties associated with the project. A fully executed Grant Agreement must be in place before work may begin. Work, purchases, or activities occurring before full execution of the Grant Agreement are NOT reimbursable.

Signed Grant Agreements and approved governing board resolutions must be submitted to CARB no later than May 14, 2024. If these documents are not submitted by the deadline, CARB, in its sole discretion, may deny the application and redirect funds to another application submitted in response to this Solicitation or to another project in the Funding Plan, as needed.

Administration

The following represent additional terms and conditions applicable to this Solicitation. By participating in this Solicitation process, each Applicant acknowledges, accepts, and agrees to all terms and conditions of this Solicitation, and represents and warrants that the Applicant will comply with and conform to all the following:

I. Advance Pay

Consistent with the Legislature's direction to expeditiously disburse grants, CARB, in its sole discretion, may provide advance payments of grant awards to support project initiation and implementation, with a focus on mitigating the constraints of modest reserves and potential cash flow problems. However, all advance payments must in each instance fully comply with all advance pay regulatory requirements. Additional information on advance pay is in the Draft Sample Grant Agreement (**Appendix B**). Only Lead Applicant may qualify for advance pay. Sub-applicants, contractors, subcontractors, consultants, Planning awardees, and other participants shall only be paid on a reimbursement basis.

II. Amended Proposal

Amended applications may only be submitted by Lead Applicants before the application deadline. Such amended applications must be a complete replacement of a previously submitted application package and must be clearly identified as such in the cover letter transmitting the new application (the "Letter of Transmittal"). CARB personnel will not merge, collate, or assemble application materials. Once received, the new amended application package will replace the previously submitted application package in its entirety. All amended application packages must be submitted and received by the application deadline.

III. Applicant's Admonishment

This Solicitation contains the instructions governing the application process, including the required format of information and materials to be submitted, requirements that must be met to be eligible for consideration, and Applicant responsibilities. Applicants must carefully read the entire Solicitation, ask appropriate questions in a timely manner, submit a complete application with all required responses by the required date and time, and make sure that all procedures and requirements of the Solicitation are followed and appropriately addressed.

IV. Agreement Requirements

The content of this Solicitation and sections of the Grantee's application shall be incorporated by reference into the final Grant Agreement. CARB reserves the right to negotiate with the selected Lead Applicant to modify the project scope, level of funding, or both. If CARB is unable to successfully negotiate and execute a Grant

Agreement with a preliminary Grantee, CARB, at its sole discretion, reserves the right to withdraw the pending award and fund the next highest ranked eligible application. This does not limit CARB's ability to withdraw a proposed award for other reasons, including for no cause, or to take any other direction consistent with applicable law.

V. Basis for Proposal

Only information supplied by CARB in writing as a part of this Solicitation process may be relied upon for the preparation of an application.

VI. Cost of Developing an Application

Applicants are responsible for the cost of developing an application, and this cost cannot be charged to the State. This Solicitation does not commit CARB to award, nor does it commit CARB to pay, any costs incurred by any Applicant resulting from the submission of an application or participation in the Solicitation process (including but not limited to travel expenses). Furthermore, no reimbursable cost shall be incurred by an application in anticipation of a Grant award. All costs associated with Solicitation participation, application preparation, and travel are the sole responsibility of each submitting Applicant. In addition, CARB is not liable for any costs incurred during environmental review (if applicable) or as a result of withdrawing a proposed award or canceling the Solicitation.

VII. Claims against CARB

Each Lead Applicant acknowledges, accepts, and understands that neither the Applicant's organization nor any of the Applicant's representatives shall have any claims whatsoever against the CARB or any of its respective officials, agents, or employees arising out of or relating to this Solicitation or these Solicitation procedures, except as between CARB as the Grantor and the Lead Applicant as the Grantee, as set forth in the terms of a Grant Agreement signed by authorized representatives of CARB and the selected Grantee. Sub-applicants and other participants shall have no rights or claims of any kind or nature against CARB or any of its respective officials, agents, or employees.

VIII. Disposition of Lead Applicant's Documents

All applications and related material submitted in response to this Solicitation become the sole and exclusive property of the CARB, will not be returned, and are public records subject to the disclosure requirements of the California Public Records Act (CPRA) as solely determined by CARB.

If trade secret or proprietary information is contained in documents or other information submitted by the Lead Applicant as a part of the application and the Lead Applicant has expressly claimed that such information falls within one or more CPRA exemptions, then the Lead Applicant must clearly mark such information

“CONFIDENTIAL AND PROPRIETARY” and identify the specific lines containing the confidential information on each document before submitting the application to CARB. In the event of a request for such information, CARB will make reasonable efforts to provide notice to the Lead Applicant prior to disclosure under the CPRA. If the Lead Applicant contends that any documents are exempt from the CPRA and wishes to prevent disclosure, the Lead Applicant is required at its own cost, liability, and expense to obtain a protective order, injunctive relief, or other appropriate remedy from a court of law in Sacramento County at least three business days before CARB’s deadline to respond to the CPRA request. If the Lead Applicant fails to obtain such a court remedy within said timeframe, then CARB may, at its discretion, disclose the requested information and CARB shall not be liable or responsible for such disclosure. The Lead Applicant agrees that it shall defend, indemnify, and hold CARB harmless for, from, and against any and all claims that may or do result from denial by CARB of a CPRA request for any Lead Applicant information.

In addition to the requirements of the CPRA, CARB may be under other legal obligations for release or disclosure of the information contained in any application submitted and makes no warranty or representation that such information and accompanying documents will not be released where required or allowed to be released by applicable law.

IX. Errors

If a Lead Applicant discovers any ambiguity, conflict, discrepancy, omission, or other error in this Solicitation, the Lead Applicant shall immediately notify CARB of such error in writing and request modification or clarification of the document before the application deadline. CARB shall not be responsible for failure to correct errors.

X. Grant and Budget Revisions

Changes in the project budget, deliverables, or extension of the project schedule should be avoided where possible. CARB will work with the Grantee to determine where flexibility is possible within the Grant Agreement to allow for community engagement to continue informing project design throughout grant implementation and will assist the Grantee with formal amendments where needed.

Once a Grant Agreement is in place, changes to the work to be done or other project scope changes may be considered by CARB, if necessary, in consultation with the Grantee. In cases where changes may be allowed by CARB, they must be approved in advance and in writing by CARB and may require a Grant Agreement amendment.

XI. Immaterial Defect

CARB may waive any immaterial defect or deviation contained in an application. CARB’s waiver shall in no way modify the application or excuse the successful Lead Applicant from full compliance.

XII. No Agreement Until Signed

No agreement between CARB and the selected Lead Applicant is in effect until the Grant Agreement is signed by the selected Lead Applicant and by the authorized CARB representative. Qualifying costs may only be reimbursed by CARB only after full execution of the Grant Agreement. No costs incurred prior to execution of the Grant Agreement are reimbursable using CARB Grant Funds.

This Solicitation and the selection process shall in no way be deemed to create a binding contract or agreement of any kind between CARB and any Lead Applicant, nor shall any information herein be construed as a representation or warranty on behalf of CARB or as a statement on which the Lead Applicant may justifiably rely in executing any license or agreement with CARB. All legal rights and obligations between any successful Lead Applicant and CARB will come into existence if and only if a Grant Agreement is signed by authorized representatives of both parties and approved by CARB. The legal rights and obligations of each party shall at that time be only those rights and obligations which are set forth in the approved and fully executed Grant Agreement.

XIII. No Modifications to the General Provisions

Because time is of the essence, if an Applicant at any time, including after preliminary selection, attempts to negotiate or otherwise seeks modification of the General Provisions (attached as **Appendix B**, Draft Sample Grant Agreement), CARB may reject the application or withdraw the proposed award. This does not alter or limit CARB's ability to withdraw a proposed award for other reasons, including for no cause.

XIV. No Public Opening

There will be no public opening of the application packages for this Solicitation.

XV. No Right to Protest

Applicants acknowledge, understand, and agree that consideration for and award of a grant is fully discretionary and at no time shall and Applicant be entitled to protest, appeal, or challenge a decision to reject or accept an application, disqualify an Applicant or an application, or withdraw or amend the Solicitation in whole or in part.

XVI. Payment of Prevailing Wages

All Applicants must read and pay particular attention to **Appendix B**, Draft Sample Grant Agreement Section N.35 entitled "Prevailing wages and labor compliance." Prevailing wage rates can be significantly higher than non-prevailing wage rates. Failure to pay legally required prevailing wage rates can result in substantial damages and financial penalties, termination of the Grant Agreement, disruption of projects,

and other complications.

XVII. Prohibition of Gifts

CARB officials are subject to several legal and policy limitations regarding receipt of gifts from persons, firms, or corporations either engaged in business with CARB or proposing to do business with CARB. The offering of any gift may be grounds for disqualification. To avoid even the appearance of impropriety, Applicants (on their own or through others) intending to submit or submitting an application shall not offer any gifts or souvenirs, even of minimal value, to any CARB officers, employees, or advisors.

XVIII. Remedies for Non-performance

In the case of non-performance, remedies detailed in this section may be utilized at CARB's discretion. Examples of non-performance include but are not limited to misuse of funding for ineligible expenses, failure to comply with program guidelines or requirements, inability to meet performance requirements or scheduled milestones, and failure to comply with the terms and conditions identified in the Grant Agreement. Remedies may include, but are not limited to:

- CARB may seek to resolve the dispute directly with the Grantee or involve a third-party mediator.
- CARB may issue a stop work order.
- CARB may terminate the Grant Agreement at its sole discretion.
- CARB may recover grant funds, spent and unspent.
- CARB may withhold funds from payment.
- CARB may take civil actions or refer for criminal action.

XIX. Solicitation Cancellation, Amendments, and Outcomes

CARB reserves the right to do any of the following at any time:

- Terminate this Solicitation (even after an intent to award has been determined), and, at CARB's sole discretion, issue a new Solicitation.
- Revise the amount of funds available under this Solicitation.
- Extend or modify deadlines specified in this Solicitation or in the Grant Agreement, including deadlines for accepting applications.
- Waive or correct any minor or inadvertent defect, irregularity, or technical error in an application, in the Solicitation, or in the Solicitation process, or as party of any subsequent grant negotiation.
- Modify the selection process, the Grant Terms, or the contents or format of the forms, conditions, instructions, or requirements.
- Request that a Lead Applicant supplement or modify all or certain aspects of a submittal or other documents or materials that have been submitted.

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- Reject any or all applications received in response to this Solicitation, without indicating any reason for such rejection.
- Modify any terms or conditions of the Draft Sample Grant Agreement.
- Terminate failed negotiations without liability and, at CARB's sole discretion, negotiate with other Lead Applicants.
- Negotiate with any or none of the Lead Applicants.
- Issue grants specified in this Solicitation by any other legal means.
- Disqualify any Lead Applicant or PCB Administrator on the basis of a real or apparent conflict of interest or evidence of collusion that is disclosed by the Lead Applicant or disclosed through other data available to CARB.
- Eliminate, reject, or disqualify an application from any Lead Applicant who fails to submit a responsive application or who later fails to demonstrate that they are a responsible Lead Applicant, as determined solely by CARB.
- Accept all or a portion of an application.

XX. Withdrawal of Application

Lead Applicants may withdraw their applications at any time. The Lead Applicant must submit a written withdrawal request signed by the Lead Applicant's duly authorized representative and addressed and submitted to Violet.Martin@arb.ca.gov.

Guiding Legislation

The following legislation guides the priorities and implementation of the Planning and Capacity Building Project Administrator Solicitation.

Assembly Bill (AB) 1532 (Pérez, Chapter 807, Statutes of 2012): Requires that Cap-and-Trade auction proceeds be used to facilitate greenhouse gas (GHG) emission reductions:

- Maximize economic, environmental, and public health benefits to the State
- Foster job creation by promoting in-State GHG emissions reduction projects carried out by California workers and businesses
- Complement efforts to improve air quality
- Direct investment toward the most disadvantaged communities and households in the State
- Provide opportunities for businesses, public agencies, nonprofits, and other community institutions to participate in and benefit from statewide efforts to reduce GHG emissions
- Lessen the impacts and effects of climate change on the State's communities, economy, and environment

AB 1550 (Gomez, Chapter 369, Statutes of 2016): Replaced and expanded investment minimums for California Climate Investments to benefit disadvantaged communities that were put in place under Senate Bill (SB) 535 (De Leon, Chapter 830, Statutes of 2012). AB 1550 expanded minimums to also include low-income communities and low-income households. The Planning and Capacity Building Project Administrator will provide capacity building, administrative and implementation support to AB1550 communities receiving funding to implement Planning, CMIS, and STEP projects.

SB 1275 (De León, Chapter 530, Statutes of 2014): Drives the development of the Low Carbon Transportation Investment's transportation equity projects, which includes the Planning and Capacity Building Project Administrator. The Planning and Capacity Building Project supports the goals outlined in SB 1275 to prioritize low- and zero-carbon transportation alternatives and increase access for disadvantaged, low-income, and moderate-income communities to these alternatives by supporting community-led transportation planning.

SB 32 (Pavley, Chapter 249, Statutes of 2016): Requires California to achieve a 40 percent GHG emission reduction below 1990 levels by 2030.

SB 375 (Steinberg, Chapter 728, Statutes of 2008): Supports the State's climate goals by helping reduce GHGs through coordinated transportation, housing, and land use planning. STEP will contribute to and support these sustainable planning practices.

SB 150 (Allen, Chapter 646, Statutes of 2017): Directed the California Air Resources Board (CARB) to assess each region's progress on achieving regional GHG emissions reduction targets per SB 375. The Planning and Capacity Building Project addresses

some of the challenges to achieving the State’s climate goals that CARB identified in the Draft 2022 Progress Report for California’s Sustainable Communities and Climate Protection Act.²⁰

SB 350 (De León, Chapter 547, Statutes of 2015): Directed CARB to conduct a study to better understand the barriers low-income residents must overcome to increase access to zero-emission and near zero-emission transportation and mobility options, and develop recommendations to increase access. The Planning and Capacity Building Project specifically addresses many of these barriers and follows the recommendations outlined by CARB in the Low-income Barriers Study, Part B: Overcoming Barriers to Clean Transportation Access for Low-income Residents.²¹

²⁰ <https://ww2.arb.ca.gov/resources/documents/tracking-progress>

²¹ <https://ww2.arb.ca.gov/our-work/programs/accessible-clean-transportation-options-sb-350>