

**Request for Program Design Information and  
Applications for Mobility Provider Directory (Mobility Operators)**

CARB Clean Mobility Options Vouchers for Disadvantaged Communities

Response Due Date: September 17<sup>th</sup>, 2019 by 5:00pm Pacific Time

This Request for Information and Applications (RFI) is issued solely for information and planning purposes and does not constitute a solicitation. Responses to the RFI will not be returned. Responses to this RFI are not an offer and cannot be accepted to form a binding contract. Respondents are not entitled to compensation for any costs incurred in responding to this RFI.

**RFI Overview and Audience**

The California Air Resources Board (CARB) is in the process of launching Clean Mobility Options Vouchers for Disadvantaged Communities (CMO), a grantmaking program that in early 2020 will begin to fund small-scale clean mobility projects for zero-emission carsharing, bikesharing, ridesharing, and other innovative mobility services around the state. CALSTART and Shared Use Mobility Center (SUMC) are managing the program and serving as the CMO Administrator.

The CMO Administrator is conducting an RFI process to obtain information in support of program design and the development of a Mobility Provider Directory (Directory). The RFI is issued with the following goals:

- Inform design of the program as related to terms and conditions for funded projects
- Screen mobility operators on basic qualifications in order to be listed in the program’s Directory
- Educate potential local and regional partners about mobility operator offerings through descriptions in the Directory

The intended audiences for this RFI are professional “mobility operators” who are interested in partnering with public agencies and community organizations to provide zero-emission shared mobility services around the state. For the purposes of the CMO program, operators are defined as *“entities that lead the development and implementation of systems for operating a mobility service, bringing together back-end systems such as user databases and payment platforms with front-facing activities such as vehicle fleet maintenance and day-to-day service provision.”*

The RFI is not intended for vendors who contribute individual elements to operational systems (such as a certain piece of technology or equipment) but who would not lead in assembling all necessary elements to develop and deploy the mobility service in the community. Such entities will be eligible to participate on project teams, but will not be listed in the Directory, which is focused on entities that will lead operation of the service.

The Directory will be an informational resource to:

- Provide statewide exposure for eligible operators interested in joining project teams
- Support lead applicants in identifying operators suitable for their communities in an informed and timely fashion
- Ensure that voucher recipients who have not included an experienced partner in their application can identify a professional operator in a streamlined manner by selecting one from the Directory after they receive the voucher
- Allow the CMO Administrator to effectively communicate and share information about offerings from interested operators

**Responding to the RFI does not prevent or compel participation in other current or future opportunities issued by the California Air Resources Board, the CMO Statewide Administrator, or CMO voucher recipients.**

**This document has been reviewed by the staff of the California Air Resources Board and approved for release. Approval does not signify that the contents necessarily reflect the views and policies of the California Air Resources Board, nor does the mention of trade names or commercial products as a result of this RFI constitute endorsement or recommendation for use.**

## **Program Background**

### **Program Goals**

The goals of the program are to increase access to clean transportation while reducing emissions of greenhouse gases (GHG) and criteria pollutants, increasing uptake of zero-emission vehicles, and improving air quality and public health in the State's most vulnerable communities. Residents—including those living in low-income and disadvantaged communities, and in tribal communities—will benefit from the use of affordable, reliable, safe, accessible and clean mobility solutions. In addition, the program seeks to provide a platform to test mobility concepts, assess key factors in developing viable and sustainable local projects, share lessons learned, and build a knowledge base to apply these lessons to future, larger-scale projects throughout the State.

The CMO program will provide funding and capacity-building in support of small-scale vehicle-sharing and ridesharing projects in disadvantaged communities. Funds will be used to purchase or lease new or used vehicles, bicycles, and other clean mobility options along with associated equipment, infrastructure, and operating costs. The CMO Administrator will also provide training, technical assistance, tools, and information-sharing opportunities to build the capacity of under-resourced organizations to enhance mobility access in their communities.

A critical goal of the program that relates to involvement by professional mobility operators is financial sustainability. A primary purpose of facilitating involvement of third-party mobility operators in projects is to realize this goal. Therefore, we are seeking to design the program to encourage participation by operators who will commit to playing an active role in making the projects sustainable and be key partners in successfully continuing projects in the communities for several years, and ideally beyond.

### **Funding Availability and Timeline**

The current cycle of CMO voucher funding is provided by FY 2017-18 Low Carbon Transportation Investments with proceeds from the State's Cap and Trade auction proceeds in the Greenhouse Gas Reduction Fund (GGRF). In this cycle, CARB has allocated \$17,000,000 to the CMO Administrator, who will distribute \$14,000,000 in voucher funding to projects around the state. Applications will be accepted in January 2020 and vouchers will be issued in Quarter 1 2020. Payments will be made to voucher recipients on a reimbursement basis as milestones are reached.

An additional \$15,000,000 has been allocated to the program from the FY 2018-19 budget. Subsequent years' funding will be identified through the Funding Plan for [Clean Transportation Incentives](#) in a public work group process.

### **Proposed Program Design**

Program eligibility criteria and other design elements are currently under development and will be finalized with the release of the Implementation Manual in early October 2019. CARB and the CMO Administrator have proposed the approaches described below in CARB's public [Work Group](#) process and received supportive feedback, but the approaches are not considered final until publication of the Implementation Manual. The information below is provided to help inform RFI responses.

## **Eligible Project Models**

CMO vouchers are intended to support the piloting of innovative clean transportation projects that introduce new clean mobility options or test new models, such as “shared” and “on-demand” mobility. Services will be operated with zero- or near-zero emission vehicles such as battery electric vehicles or hydrogen fuel cell vehicles.

The following are the main project models that would be eligible to receive CMO voucher funds:

- Carsharing
- Bike-sharing, scooter-sharing, and other forms of novel shared micro-vehicles
- Carpooling, vanpooling, and other forms of ridesharing
- On-demand shuttles, microtransit, and other innovative transit services
- Shared ride on demand

In addition to supporting capital and operating costs to deploy the services described above, CMO vouchers would also fund installation of infrastructure such as electric vehicle supply equipment (EVSE) or bicycle/scooter parking.

## **Eligible Applicants**

Lead applicants will submit applications, receive voucher funding, and be responsible for leading projects in their communities. Under the current proposal, lead applicants could include local and regional agencies, non-profit organizations, or federally-recognized tribal authorities. Sub-applicants will contract with lead applicants and could be any public, private, or non-profit organization. Each funded team would be required to include a partner (whether lead applicant, sub-applicant, or subcontractor identified after award) with some level of experience providing mobility services. Professional mobility operators would be encouraged to participate in applications, either as sub-applicants or as lead applicants (consistent with the other applicant eligibility criteria described above).

## **Maximum Voucher Amounts and Performance Period**

Voucher funding would support a variety of costs associated implementing clean shared mobility projects, up to a proposed amount of \$1,000,000 for new projects and \$600,000 for services that are already operating in the neighborhood project area. Under the current proposal, funded services would be required to operate for at least two years, with partners agreeing to a goal of sustainability over at least four years (subject to change).

## **Applicant Experience and the Mobility Provider Directory**

Each voucher recipient team will be required to include a partner with experience operating mobility services. Any partner with the requisite experience may be included at the time of application, as the lead applicant or as a sub-applicant, to satisfy this requirement. However, *if a partner with requisite experience is not included as part of the application, the lead applicant would commit to selecting a professional mobility operator from the Mobility Provider Directory after award.*

The CMO Administrator's current proposal, to be discussed in a public Work Group meeting in September 2019, is that each team must include a partner with **at least one year** of experience operating a mobility service. The final proposal on required experience will be included in the final Implementation Manual.

Respondents to this RFI who wish to be included in the Directory must satisfy the following terms:

- Meet the minimum requirement for mobility operations experience (currently proposed as one year)
- Be in good standing with the California Secretary of State and are able to supply a Certificate of Status indicating the business is active and in good standing upon request

Operators are not required to be listed in the Directory to be eligible to participate in voucher projects, and any operator may participate on an applicant team at the time of voucher application regardless of inclusion in the Directory. The Directory will also be updated on a regular basis.

## **RFI Response Format**

Respondents should provide information on the topics listed in the questionnaire below regarding your organization's approach in delivering mobility services. **Total length of the response must not exceed 15 pages.**

Responses should be specific to the service type being offered (e.g. carsharing, vanpooling, microtransit). If the respondent is offering multiple service types and information differs significantly for each, please develop a separate response document for each type. Please indicate where you have flexibility in the approaches described or where your approaches are very context-sensitive (e.g. urban vs. rural projects).

Responses to this RFI are voluntary. The CMO Administrator will use the information submitted in response to this RFI at its discretion, and reserves the right to use any submitted information in publicly-accessible reports or other resources for CMO voucher recipients. **Do not include any information you consider proprietary, classified, confidential, trade secret, or sensitive in your response.**

**Please note:** A response does not bind or obligate the provider to any agreement of provision or procurement of services referenced.

## **Mobility Provider Questionnaire**

The information gathered through this questionnaire is intended to support the following goals:

- Screen mobility operators on a set of proposed eligibility criteria in order to be listed in the program's Mobility Provider Directory (Section 1)
- Educate potential local and regional partners about mobility operator offerings through descriptions in the Directory (Sections 2 and 3)
- Inform design of the program as related to guidelines for funded projects (Sections 2 and 3)

### **I. Screening for Mobility Provider Directory - Organization and Services**

*Responses in this section are required for inclusion in the Directory. .*

- A. Briefly describe your organization, including type and location of incorporation.
- B. Is your organization licensed/registered to conduct business in the State of California and in good standing with the California Secretary of State?
- C. Describe the types of mobility service(s) your organization is prepared to operate to serve residents of California's low-income, disadvantaged, and/or tribal communities through the Clean Mobility Options program. Please be specific and provide multiple options or models if relevant.
- D. Describe your organization's experience operating the proposed mobility service(s) in specific communities and regions. Please detail the number of years/months operating, and provide three partner references describing the nature of the relationship and contact information.
- E. Please describe any preferences or limitations for geographies where you are interested to operate services (e.g. urban/rural, specific regions, etc.)

- F. Where relevant to your proposed service(s), which of the following mobility service elements are you able to deliver to voucher recipient teams, whether directly or through subcontractors that you would coordinate? (Please list, and feel free to offer any additional narrative)
- Vehicle procurement
  - Vehicle telematics and other hardware
  - Payment platforms
  - Reservation / dispatch systems
  - Routing technology
  - Fleet management (maintenance, insurance, etc.)
  - Service operations / staffing
  - Electric vehicle supply equipment procurement
  - Electric vehicle supply equipment installation
  - Electric vehicle supply equipment operations
  - Bicycle / scooter parking or charging equipment procurement
  - Bicycle / scooter parking or charging equipment installation
  - Bicycle / scooter parking or charging equipment operations
  - Other (please describe)

## **II. Recommendations on Appropriate Partnership Models**

*The CMO Administrator may define allowable cost and revenue models associated with project partnerships. In this section, please describe models that you believe are appropriate for advancing equity-focused partnerships between mobility providers and local public agencies or community-based organizations. Responses may be summarized in the Directory but do not bind the respondent to offering these terms to CMO voucher recipients.*

- A. The program aims to seed projects that will operate for many years and seeks to involve professional mobility providers who will play a critical role in realizing this goal. In what way should CMO voucher recipients expect mobility providers to commit to the sustainability of projects over many years? Please describe strategies for working with partners to ensure long-term financial sustainability of services that may not be profitable or recover all costs in the short term.
- B. A goal of the CMO program is to increase transportation access in low-income and disadvantaged communities across the state. What are appropriate pricing models for efficiently managing demand and generating revenue while ensuring affordability in these communities?
- C. What are appropriate arrangements for distribution of revenue from the service? (e.g. what entities would receive revenue from the service and what level, if any, of minimum revenue guarantee should providers be allowed to require)?

- D. What is the appropriate level (or range) of eligible cost reimbursement for operating the service(s) described in Section I? Please develop your response considering a two-year operating period, with costs described on a standardized basis (e.g. dollar-per-vehicle, dollar-per-ride, dollar-per-mile, other per-unit etc.). Feel free to include key assumptions and/or dependencies.
- E. Please estimate ranges for the share of total costs represented by various cost categories, including vehicles and other equipment, EVSE and other infrastructure, hardware and software platforms, marketing, and operations and maintenance. Please create a table for each type of service proposed. An example is provided below.

Cost Category	Share of Total Cost	
	Example	Your Response
Vehicles and other equipment	30-40%	
EVSE and other infrastructure	15-20%	
Hardware and software platforms	8-10%	
Marketing	10-15%	
Operations and maintenance	20-30%	

- F. Towards supporting the goal of creating sustainable benefits for underserved communities, what is a reasonable expectation of cost-sharing with partners? (i.e. what costs should be covered by CMO voucher funding vs. by mobility providers)?
- G. Building on your responses about appropriate partnership models above, please outline any differentiated benefits to project applicants/communities that your organization is willing and able to offer (e.g. discounts or additional value for the same costs).

**III. Recommendations on Terms and Conditions**

*Below is an outline of draft terms and conditions (T&Cs) topics that will apply to all operators, whether they are listed in the Directory or not. Please provide any feedback on appropriate standard terms and conditions on these topics, as well as any differentiated approaches that your organization may offer that could be considered in program design and summarized in the Directory. Responses do not bind the respondent to offering the suggested terms to CMO voucher recipients.*

- A. RISK MANAGEMENT AND LIABILITY
  - 1. Insurance policy types and levels of coverage
  - 2. Indemnification of partners



B. EQUITY AND ACCESSIBILITY

1. Language translation
2. Payment and reservation solutions for the unbanked
3. Payment and reservations solutions for those without mobile devices
4. Arrangements to enable participation by those without drivers licenses
5. ADA accessibility, including but not limited to wheelchair accessible vehicles and resources for the hearing- or vision-impaired

C. SAFETY

1. Regular vehicle inspections and maintenance to ensure vehicles are in a state of good repair
2. Enforcing driver/end-user eligibility requirements, i.e. license confirmation, safety education
3. Other safety measures

D. REGULATORY COMPLIANCE

1. Compliance with local and state regulations

E. DATA MANAGEMENT

1. Data ownership and rights and/or licenses granted to partners or other third-parties
2. Secure data storage
3. Data-sharing for project evaluation purposes (e.g. number of trips, location of trip origination and destination, trip length/VMT, cost of trip, etc.)
4. Protection of personally identifiable information
5. Commitment to utilizing assets for administering user surveys required by the CMO Administrator

F. OTHER KEY TERMS AND CONDITIONS

*Please offer suggestions relating to other goals or risks that may be best addressed through terms and conditions that would apply to mobility operators, along with any suggested approaches for defining those terms and conditions.*

## **KEY RFI DATES**

ACTIVITY:	DATE:
Issue of RFI	August 26, 2019
Submission of RFI Responses	September 17, 2019 by 5:00pm Pacific
Mobility Provider Directory Published	October 2019

## **RFI RESPONSE SUBMISSION AND FOLLOW UP**

All questions regarding this RFI must be submitted in writing via email to [RFI@cleanmobilityoptions.org](mailto:RFI@cleanmobilityoptions.org). The email subject line should contain reference to the Clean Mobility Options RFI. The CMO Administrator will compile responses to questions and distribute via the RFI distribution email list on a rolling basis. Interested parties may request to be added to the RFI distribution email list by emailing [RFI@cleanmobilityoptions.org](mailto:RFI@cleanmobilityoptions.org).

Inquiries specifically regarding RFI responses or formulation of the Directory are not to be directed to any staff member of CARB or the CMO Administrator. Such action may disqualify the respondent from further consideration for inclusion in the Directory. All stakeholders may continue to engage with CARB or the CMO Administrator to provide general input on program design.

If it becomes necessary to revise any part of this RFI, or if additional information is necessary for a clearer interpretation of provisions of this RFI prior to the due date for submissions, an addendum will be distributed through the RFI distribution email list.

Responses to this RFI must be submitted electronically to [RFI@cleanmobilityoptions.org](mailto:RFI@cleanmobilityoptions.org) no later than 5:00pm Pacific Time on September 17<sup>th</sup>, 2019. The email subject line should contain reference to the Clean Mobility Options RFI.

After receiving responses to this RFI, the CMO Administrator may call the respondent to clarify information provided in its response. The CMO Administrator will then provide an opportunity for eligible respondents to review their entries in the draft Directory before publication in October 2019.