

GRANT REQUEST FORM (GRF)

CEC-270 (Revised 10/2015)

CALIFORNIA ENERGY COMMISSION

New Agreement ARV-18-030 (To be completed by CGL Office)

Division	Agreement Manager:	MS-	Phone
600 Fuels and Transportation Division	Susan Ejlalmaneshan	6	916-654-4781

Recipient's Legal Name	Federal ID Number
Fresno Metro Black Chamber Foundation	27-2369570

Title of Project
Electric Vehicle Marketing and Uptake in Valley Shared Mobility Systems

Term and Amount	Start Date	End Date	Amount
	06 / 12 / 2019	06 / 15 / 2021	\$ 614,945

Business Meeting Information
 ARFVTP agreements \$75K and under delegated to Executive Director.

Proposed Business Meeting Date	06 / 12 / 2019	<input type="checkbox"/> Consent	<input checked="" type="checkbox"/> Discussion
Business Meeting Presenter	Susan Ejlalmaneshan	Time Needed:	5 minutes

Please select one list serve. Altfuels (AB118- ARFVTP)

Agenda Item Subject and Description

FRESNO METRO BLACK CHAMBER FOUNDATION. Proposed resolution approving Agreement ARV-18-030 with the Fresno Metro Black Chamber Foundation for a \$614,945 grant to support the rapid growth of light-duty electric vehicles in the San Joaquin Valley through outreach for electric car-sharing and ridesharing services, electric vehicle marketing and education campaigns, and development of an electric vehicle ambassadorship program. (ARFVTP Funding) Contact: Susan Ejlalmaneshan (Staff presentation: 5 minutes)

California Environmental Quality Act (CEQA) Compliance

1. Is Agreement considered a "Project" under CEQA?
 Yes (skip to question 2) No (complete the following (PRC 21065 and 14 CCR 15378)):
 Explain why Agreement is not considered a "Project":
 Agreement will not cause direct physical change in the environment or a reasonably foreseeable indirect physical change in the environment because work under this agreement consists of office work, advertising, social media campaigns, and similar activities. No construction or any physical activity will be undertaken under this agreement.
2. If Agreement is considered a "Project" under CEQA:
 a) Agreement **IS** exempt. (Attach draft NOE)
 Statutory Exemption. List PRC and/or CCR section number: _____
 Categorical Exemption. List CCR section number: _____
 Common Sense Exemption. 14 CCR 15061 (b) (3)
 Explain reason why Agreement is exempt under the above section:
- b) Agreement **IS NOT** exempt. (Consult with the legal office to determine next steps.)
 Check all that apply
 Initial Study Environmental Impact Report
 Negative Declaration Statement of Overriding Considerations
 Mitigated Negative Declaration

List all subcontractors (major and minor) and equipment vendors: (attach additional sheets as necessary)

Legal Company Name:	Budget
Please see the attachment	\$
	\$
	\$

List all key partners: (attach additional sheets as necessary)

Legal Company Name:
UC Davis

GRANT REQUEST FORM (GRF)



Budget Information			
Funding Source	Funding Year of Appropriation	Budget List No.	Amount
ARFVTP	17-18	600.118G	\$614,945
Funding Source			\$
R&D Program Area:	N/A	TOTAL:	\$614,945
Explanation for "Other" selection			
Reimbursement Contract #:		Federal Agreement #:	

Recipient's Administrator/ Officer		Recipient's Project Manager	
Name:	Erica M. Foster	Name:	Tara Lynn Gray
Address:	Fresno Metro Black Chamber Foundation 1444 Fulton Street #206	Address:	Fresno Metro Black Chamber Foundation 1444 Fulton Street #206
City, State, Zip:	Fresno, CA, 93721	City, State, Zip:	Fresno, CA, 93721
Phone:	559-441-7929	Phone:	559-441-7929
Fax:	- -	Fax:	- -
E-Mail:	ericamfoster@fmbcc.com	E-Mail:	taralynngray@fmbcc.com

Selection Process Used	
<input checked="" type="checkbox"/> Competitive Solicitation	Solicitation #: GFO-18-603
<input type="checkbox"/> First Come First Served Solicitation	

The following items should be attached to this GRF	
1. Exhibit A, Scope of Work	<input checked="" type="checkbox"/> Attached
2. Exhibit B, Budget Detail	<input checked="" type="checkbox"/> Attached
3. CEC 105, Questionnaire for Identifying Conflicts	<input checked="" type="checkbox"/> Attached
4. Recipient Resolution	<input checked="" type="checkbox"/> N/A <input type="checkbox"/> Attached
5. CEQA Documentation	<input checked="" type="checkbox"/> N/A <input type="checkbox"/> Attached

_____ Agreement Manager _____ Date _____ Office Manager _____ Date _____ Deputy Director _____ Date

List all subcontractors (major and minor) and equipment vendors:

Legal Company Name:	Budget
Sigala, Inc.	\$40,000
Self Help Enterprises	\$50,000
Mobility Development Partners	\$50,000
Fresno State Office of Community and Economic Development (OCED)	\$75,000
LEAP Institute, LLC	\$30,000

Exhibit A SCOPE OF WORK

TECHNICAL TASK LIST

Task #	CPR Meeting	Task Name
1		Administration
2		Synthesis of Marketing Background and Focus Groups
3	X	Marketing Plan Development Around Deployed Carsharing Networks
4	X	Advertising, Outreach & Social Media Campaigns
5	X	Planning for Expansion of Clean Shared Mobility Throughout The San Joaquin Valley
6		Data Collection & Analysis

KEY NAME LIST

Task #	Key Personnel	Key Subcontractor(s)	Key Partner(s)
1	Tara Lynn Gray, Kaya Herron	Mobility Development Partners	
2	Caroline Rodier, Troy Hightower, Rachel Heckl	Sigala, Inc. LEAP Institute	
3	Tara Lynn Gray, Creighton Randall, Troy Hightower	Mobility Development Partners , Fresno State OCED, LEAP Institute	
4	Rachel Heckl, Ishmael Herrera	Fresno State OCED, Self Help Enterprises, LEAP Institute	
5	Tara Lynn Gray, Caroline Rodier, Troy Hightower	Sigala, Inc. Mobility Development Partners	UC Davis
6	Tara Lynn Gray Troy Hightower	Mobility Development Partners	UC Davis

GLOSSARY

Specific terms and acronyms used throughout this scope of work are defined as follows:

Term/ Acronym	Definition
ARFVTP	Alternative and Renewable Fuel and Vehicle Technology Program
BEV	Battery Electric Vehicle
CAM	Commission Agreement Manager
CARB	California Air Resource Board
CSMN	Clean Shared Mobility Network
CPR	Critical Project Review
DACs	Disadvantaged Communities
DAR	Demand and Response
DCFC	Direct Current Fast Charger
EV	Electric Vehicle
EVSE	Electric Vehicle Supply Equipment
FAX	Fresno Area Express Transit Service
FCRTA	Fresno County Rural Transit Authority
FEOC	Fresno Employment Opportunity Center
FTD	Fuels and Transportation Division
FMBCC	Fresno Metro Black Chamber of Commerce
FMBCF	Fresno Metro Black Chamber Foundation
Green Raiteros	An electric vehicle based rural ridesharing network based in Huron, CA. A program of The LEAP Institute.
LEAP Institute	The Latino Equity Advocacy and Policy Institute
OCED	Fresno State Office of Community & Economic Development
PG&E	Pacific Gas & Electric
Recipient	Fresno Metro Black Chamber Foundation
SGC	Strategic Growth Council

SHE	Self Help Enterprises
SJV	San Joaquin Valley
TCAT	Tulare County Area Transit
TCC	Transformative Climate Communities
Valley Go	"Ecosystem of Shared Mobility / Valley GO" is a CARB funded carsharing network pilot funded by California Air Resource Board (CARB)

Background:

Assembly Bill (AB) 118 (Núñez, Chapter 750, Statutes of 2007), created the Alternative and Renewable Fuel and Vehicle Technology Program (ARFVTP). The statute authorizes the California Energy Commission (Energy Commission) to develop and deploy alternative and renewable fuels and advanced transportation technologies to help attain the state’s climate change, clean air, and alternative energy policies. AB 8 (Perea, Chapter 401, Statutes of 2013) re-authorizes the ARFVTP through January 1, 2024. The ARFVTP has an annual budget of approximately \$100 million and provides financial support for projects that:

- Reduce California’s use and dependence on petroleum transportation fuels and increase the use of alternative and renewable fuels and advanced vehicle technologies.
- Produce sustainable alternative and renewable low-carbon fuels in California.
- Expand alternative fueling infrastructure and fueling stations.
- Improve the efficiency, performance, and market viability of alternative light-, medium-, and heavy-duty vehicle technologies.
- Retrofit medium- and heavy-duty on-road and non-road vehicle fleets to alternative technologies or fuel use.
- Expand the alternative fueling infrastructure available to existing fleets, public transit, and transportation corridors.
- Establish workforce training programs and conduct public outreach on the benefits of alternative transportation fuels and vehicle technologies.

The Energy Commission issued solicitation GFO-18-603 for outreach, education and collaborative planning for California’s Central Valley. To be eligible for funding under GFO-18-603, projects must also be consistent with the Energy Commission’s ARFVTP Investment Plan, updated annually. In response to GFO-18-603, Fresno Metro Black Chamber Foundation (Recipient) submitted application #8 titled “Electric Vehicle Marketing and Uptake in Valley Shared Mobility Systems” (Project), which was proposed for funding in the Energy Commission’s Notice of Proposed Awards on February 19, 2019. GFO-18-603 and Recipient’s aforementioned application are hereby incorporated by reference into this Agreement in their entirety.

In the event of any conflict or inconsistency between the terms of the Solicitation and the terms of the Recipient’s Application, the Solicitation shall control. In the event of any conflict or inconsistency between the Recipient’s Application and the terms of the Energy Commission’s Award, the Energy Commission’s Award shall control. Similarly, in the event of any conflict or

inconsistency between the terms of this Agreement and the Recipient's Application, the terms of this Agreement shall control.

Problem Statement:

Adoption of electric vehicles (EV) is challenging, especially in the San Joaquin Valley, due to 1) affordability, 2) practicality and access, and 3) awareness, visibility, and range anxiety. Private EV ownership is financially infeasible for many residents and a strained public transportation system has both geographic and temporal gaps in service that allow for new solutions to gain traction in the market. The majority of the target market rent their homes and would have limited access to at-home charging.

Goals of the Agreement:

The goal of this Agreement is to capitalize on the ongoing and significant investments in community-based engagement and marketing necessary to support the rapid growth of several electric vehicle carsharing and ridesharing services in disadvantaged communities in the San Joaquin Valley. These pilots, all currently in the early stages of launch, will introduce EV carsharing and ridesharing and charging infrastructure in 11 disadvantaged communities in Fresno, Tulare, and Kern counties. This investment will increase the reach and impact of these programs both for users and non-users alike, and will generate residual interest and awareness in EVs in the three-county region. With success, this program can be expanded across all of San Joaquin Valley.

Objectives of the Agreement:

The objectives of this Agreement are to increase EV utilization through increased membership in pilot EV carsharing networks and in doing so maximize the GHG reductions per dollar of Commission funds spent. Meeting an objective of capturing 3,000 carsharing members and users across three counties over two years will require interactions with over 20,000 potential members as well as hundreds of thousands of unique impressions made by the network itself, social media, advertising and interactions at planned educational events.

TASK 1 ADMINISTRATION

Task 1.1 Attend Kick-off Meeting

The goal of this task is to establish the lines of communication and procedures for implementing this Agreement. The CAM shall designate the date and location of this meeting and provide an agenda to the Recipient prior to the meeting.

The Recipient shall:

- Attend a "Kick-Off" meeting with the Commission Agreement Manager, the Grants Officer, and a representative of the Accounting Office. The Recipient shall bring its Project Manager, Agreement Administrator, Accounting Officer, and others designated by the Commission Agreement Manager to this meeting.
- Discuss the following administrative and technical aspects of this Agreement:
 - Agreement Terms and Conditions
 - Critical Project Review (Task 1.2)
 - Match fund documentation (Task 1.6) No reimbursable work may be done until this documentation is in place.
 - Permit documentation (Task 1.7)
 - Subcontracts needed to carry out project (Task 1.8)

- The CAM's expectations for accomplishing tasks described in the Scope of Work
- An updated Schedule of Products and Due Dates
- Monthly Progress Reports (Task 1.4)
- Technical Products (Product Guidelines located in Section 5 of the Terms and Conditions)
- Final Report (Task 1.5)

Recipient Products:

- Updated Schedule of Products
- Updated List of Match Funds
- Updated List of Permits

Commission Agreement Manager Product:

- Kick-Off Meeting Agenda

Task 1.2 Critical Project Review (CPR) Meetings

CPRs provide the opportunity for frank discussions between the Energy Commission and the Recipient. The goal of this task is to determine if the project should continue to receive Energy Commission funding to complete this Agreement and to identify any needed modifications to the tasks, products, schedule or budget.

The Commission Agreement Manager may schedule CPR meetings as necessary, and meeting costs will be borne by the Recipient.

Meeting participants include the CAM and the Recipient and may include the Commission Grants Officer, the Fuels and Transportation Division (FTD) staff, other Energy Commission staff and management as well as other individuals selected by the CAM to provide support to the Energy Commission.

The CAM shall:

- Determine the location, date, and time of each CPR meeting with the Recipient. These meetings generally take place at the Energy Commission, but they may take place at another location.
- Send the Recipient the agenda and a list of expected participants in advance of each CPR. If applicable, the agenda shall include a discussion on both match funding and permits.
- Conduct and make a record of each CPR meeting. Prepare a schedule for providing the written determination described below.
- Determine whether to continue the project, and if continuing, whether or not modifications are needed to the tasks, schedule, products, and/or budget for the remainder of the Agreement. Modifications to the Agreement may require a formal amendment (please see section 8 of the Terms and Conditions). If the CAM concludes that satisfactory progress is not being made, this conclusion will be referred to the Lead Commissioner for Transportation for his or her concurrence.

- Provide the Recipient with a written determination in accordance with the schedule. The written response may include a requirement for the Recipient to revise one or more product(s) that were included in the CPR.

The Recipient shall:

- Prepare a CPR Report for each CPR that discusses the progress of the Agreement toward achieving its goals and objectives. This report shall include recommendations and conclusions regarding continued work of the projects. This report shall be submitted along with any other products identified in this scope of work. The Recipient shall submit these documents to the CAM and any other designated reviewers at least 15 working days in advance of each CPR meeting.
- Present the required information at each CPR meeting and participate in a discussion about the Agreement.

CAM Products:

- Agenda and a list of expected participants
- Schedule for written determination
- Written determination

Recipient Product:

- CPR Report(s)

Task 1.3 Final Meeting

The goal of this task is to closeout this Agreement.

The Recipient shall:

- Meet with Energy Commission staff to present the findings, conclusions, and recommendations. The final meeting must be completed during the closeout of this Agreement.

This meeting will be attended by, at a minimum, the Recipient, the Commission Grants Office Officer, and the Commission Agreement Manager. The technical and administrative aspects of Agreement closeout will be discussed at the meeting, which may be two separate meetings at the discretion of the Commission Agreement Manager.

The technical portion of the meeting shall present an assessment of the degree to which project and task goals and objectives were achieved, findings, conclusions, recommended next steps (if any) for the Agreement, and recommendations for improvements. The Commission Agreement Manager will determine the appropriate meeting participants.

The administrative portion of the meeting shall be a discussion with the Commission Agreement Manager and the Grants Officer about the following Agreement closeout items:

- What to do with any equipment purchased with Energy Commission funds (Options)
 - Energy Commission's request for specific "generated" data (not already provided in Agreement products)
 - Need to document Recipient's disclosure of "subject inventions" developed under the Agreement
 - "Surviving" Agreement provisions
 - Final invoicing and release of retention
- Prepare a schedule for completing the closeout activities for this Agreement.

Products:

- Written documentation of meeting agreements
- Schedule for completing closeout activities

Task 1.4 Monthly Progress Reports

The goal of this task is to periodically verify that satisfactory and continued progress is made towards achieving the objectives of this Agreement on time and within budget.

The objectives of this task are to summarize activities performed during the reporting period, to identify activities planned for the next reporting period, to identify issues that may affect performance and expenditures, and to form the basis for determining whether invoices are consistent with work performed.

The Recipient shall:

- Prepare a Monthly Progress Report which summarizes all Agreement activities conducted by the Recipient for the reporting period, including an assessment of the ability to complete the Agreement within the current budget and any anticipated cost overruns. Each progress report is due to the Commission Agreement Manager within 10 days of the end of the reporting period. The recommended specifications for each progress report are contained in Section 6 of the Terms and Conditions of this Agreement.
- In the first Monthly Progress Report and first invoice, document and verify match expenditures and provide a synopsis of project progress, if match funds have been expended or if work funded with match share has occurred after the notice of proposed award but before execution of the grant agreement. If no match funds have been expended or if no work funded with match share has occurred before execution, then state this in the report. All pre-execution match expenditures must conform to the requirements in the Terms and Conditions of this Agreement.

Product:

- Monthly Progress Reports

Task 1.5 Final Report

The goal of the Final Report is to assess the project's success in achieving the Agreement's goals and objectives, advancing science and technology, and providing energy-related and other benefits to California.

The objectives of the Final Report are to clearly and completely describe the project's purpose, approach, activities performed, results, and advancements in science and technology; to present a public assessment of the success of the project as measured by the degree to which goals and objectives were achieved; to make insightful observations based on results obtained; to draw conclusions; and to make recommendations for further projects and improvements to the FTD project management processes.

The Final Report shall be a public document. If the Recipient has obtained confidential status from the Energy Commission and will be preparing a confidential version of the Final Report as well, the Recipient shall perform the following activities for both the public and confidential versions of the Final Report.

The Recipient shall:

- Prepare an Outline of the Final Report, if requested by the CAM.
- Prepare a Final Report following the latest version of the Final Report guidelines which will be provided by the CAM. The CAM shall provide written comments on the Draft Final Report within fifteen (15) working days of receipt. The Final Report must be completed at least 60 days before the end of the Agreement Term.
- Submit one bound copy of the Final Report with the final invoice.

Products:

- Outline of the Final Report, if requested
- Draft Final Report
- Final Report

Task 1.6 Identify and Obtain Matching Funds

The goal of this task is to ensure that the match funds planned for this Agreement are obtained for and applied to this Agreement during the term of this Agreement.

The costs to obtain and document match fund commitments are not reimbursable through this Agreement. Although the Energy Commission budget for this task will be zero dollars, the Recipient may utilize match funds for this task. Match funds shall be spent concurrently or in advance of Energy Commission funds for each task during the term of this Agreement. Match funds must be identified in writing and the associated commitments obtained before the Recipient can incur any costs for which the Recipient will request reimbursement.

The Recipient shall:

- Prepare a letter documenting the match funding committed to this Agreement and submit it to the Commission Agreement Manager at least 2 working days prior to the kick-off meeting. If no match funds were part of the proposal that led to the Energy Commission awarding this Agreement and none have been identified at the time this Agreement starts, then state such in the letter. If match funds were a part of the proposal that led to the Energy Commission awarding this Agreement, then provide in the letter a list of the match funds that identifies the:

- Amount of each cash match fund, its source, including a contact name, address and telephone number and the task(s) to which the match funds will be applied.
- Amount of each in-kind contribution, a description, documented market or book value, and its source, including a contact name, address and telephone number and the task(s) to which the match funds will be applied. If the in-kind contribution is equipment or other tangible or real property, the Recipient shall identify its owner and provide a contact name, address and telephone number, and the address where the property is located.
- Provide a copy of the letter of commitment from an authorized representative of each source of cash match funding or in-kind contributions that these funds or contributions have been secured. For match funds provided by a grant a copy of the executed grant shall be submitted in place of a letter of commitment.
- Discuss match funds and the implications to the Agreement if they are reduced or not obtained as committed, at the kick-off meeting. If applicable, match funds will be included as a line item in the progress reports and will be a topic at CPR meetings.
- Provide the appropriate information to the Commission Agreement Manager if during the course of the Agreement additional match funds are received.
- Notify the Commission Agreement Manager within 10 days if during the course of the Agreement existing match funds are reduced. Reduction in match funds must be approved through a formal amendment to the Agreement and may trigger an additional CPR meeting.

Products:

- A letter regarding match funds or stating that no match funds are provided
- Copy(ies) of each match fund commitment letter(s) (if applicable)
- Letter(s) for new match funds (if applicable)
- Letter that match funds were reduced (if applicable)

Task 1.7 Identify and Obtain Required Permits

The goal of this task is to obtain all permits required for work completed under this Agreement in advance of the date they are needed to keep the Agreement schedule on track.

Permit costs and the expenses associated with obtaining permits are not reimbursable under this Agreement. Although the Energy Commission budget for this task will be zero dollars, the Recipient shall budget match funds for any expected expenditures associated with obtaining permits. Permits must be identified in writing and obtained before the Recipient can make any expenditure for which a permit is required.

The Recipient shall:

- Prepare a letter documenting the permits required to conduct this Agreement and submit it to the Commission Agreement Manager at least 2 working days prior to the kick-off meeting. If there are no permits required at the start of this Agreement, then state such in the letter. If it is known at the beginning of the

Agreement that permits will be required during the course of the Agreement, provide in the letter:

- A list of the permits that identifies the:
 - Type of permit
 - Name, address and telephone number of the permitting jurisdictions or lead agencies
- The schedule the Recipient will follow in applying for and obtaining these permits.
- Discuss the list of permits and the schedule for obtaining them at the kick-off meeting and develop a timetable for submitting the updated list, schedule and the copies of the permits. The implications to the Agreement if the permits are not obtained in a timely fashion or are denied will also be discussed. If applicable, permits will be included as a line item in the Progress Reports and will be a topic at CPR meetings.
- If during the course of the Agreement additional permits become necessary, provide the appropriate information on each permit and an updated schedule to the Commission Agreement Manager.
- As permits are obtained, send a copy of each approved permit to the Commission Agreement Manager.
- If during the course of the Agreement permits are not obtained on time or are denied, notify the Commission Agreement Manager within 5 working days. Either of these events may trigger an additional CPR.

Products:

- Letter documenting the permits or stating that no permits are required
- A copy of each approved permit (if applicable)
- Updated list of permits as they change during the term of the Agreement (if applicable)
- Updated schedule for acquiring permits as changes occur during the term of the Agreement (if applicable)
- A copy of each final approved permit (if applicable)

Task 1.8 Obtain and Execute Subcontracts

The goal of this task is to ensure quality products and to procure subcontractors required to carry out the tasks under this Agreement consistent with the Agreement Terms and Conditions and the Recipient's own procurement policies and procedures. It will also provide the Energy Commission an opportunity to review the subcontracts to ensure that the tasks are consistent with this Agreement, and that the budgeted expenditures are reasonable and consistent with applicable cost principles.

The Recipient shall:

- Manage and coordinate subcontractor activities.
- Submit a draft of each subcontract required to conduct the work under this Agreement to the Commission Agreement Manager for review.

- Submit a final copy of the executed subcontract.
- If Recipient decides to add new subcontractors, then the Recipient shall notify the CAM.

Products:

- Letter describing the subcontracts needed, or stating that no subcontracts are required.
- Draft subcontracts
- Final subcontracts

TECHNICAL TASKS

TASK 2: SYNTHESIS OF MARKETING BACKGROUND AND FOCUS GROUPS

The goal of this task is to build the foundation for localized marketing campaigns by employing recent mobility focus group data from the San Joaquin Valley, and by reviewing precedent for EV marketing and EV carsharing campaign models.

The Recipient shall:

- Collect and synthesize precedent models, studies and focus group data for the region.
- Present information to steering committees and other marketing partners for discussion.
- Prepare for CAM review and comment a draft reference document to guide marketing strategy for use in programs such as ValleyGo, operated by Self Help Enterprises; Clean Shared Mobility Network (CSMN) led by Fresno Metro Black Chamber Foundation; and Green Reiteros (GR) operated by LEAP Institute. The draft reference document will include, but is not limited to identification of key stakeholders and their roles.
- Prepare and submit a final reference document to guide marketing strategy. The final reference document will include, but is not limited the results from focus groups and marketing background research.

Products:

- Draft reference document
- Final reference document

TASK 3: MARKETING PLAN DEVELOPMENT FOR DEPLOYED CARSHARING NETWORKS

Task 3.1: Assemble and Facilitate Steering Committees Across Three Counties

The goal of this task is to promote the outreach and adoption of electric vehicles. Campaigns that leverage carshare programs present a significant opportunity to expose underserved communities to EVs without traditional barriers to adoption.

The Recipient shall:

- Identify community leaders and organizations from three counties interested in shaping and disseminating localized and effective marketing for EV uptake.
- Conduct quarterly Steering Committee face-to-face meetings.
- Conduct monthly Steering Committee Working Group meetings.
- As necessary, develop and submit marketing guidance memos which communicate marketing guidelines to deliver to the intended marketing targets.
- Develop a public and community relations plan. This plan includes the “how to” guide for communicating with the target communities and will include but is not limited to; target customer information, community needs, communication cycles, messaging, strategies, and objectives.

Products:

- Minutes and other documents from quarterly Steering Committee meetings
- Marketing guidance memos
- Public and community relations plan

Task 3.2: Create Branding and Identity Synergies between Existing Marketing Campaigns

The goal of this task is to optimize critical messaging across shared mobility networks, and in conjunction with generalized messaging around EV incentives, EV technology including education, financial considerations and integrating EVs into individual users’ mobility considerations. Where feasible, this messaging will also be integrated with other closely related social services, including transit, healthcare, and legal services.

The Recipient shall:

- Develop branding, messaging and campaign strategies.
- Develop and submit a unified branding and messaging guide for use across ValleyGO, CSMN and GR programs outlining carsharing model, incentives, and ownership voucher programs. The guide shall include descriptions of:
 - A common logo and/or brand name across programs.
 - A common program website.
 - Common messaging around these programs (tag lines, phrasing regarding pricing, geographies served, and the diversity of the membership base).
 - Co-advertising collateral and ads for transit agencies and other social services operating in the target communities.
 - Clear and coordinated messaging on applicable EV and EVSE incentives programs.

Products:

- Branding and Messaging Guide

Task 3.3: Completed Outreach and Marketing Campaigns Plan

The goal of this task is to detail and refine the operations and budget for effective campaign implementation in the San Joaquin Valley.

The Recipient shall:

- Develop and outline a pro forma budget with specifics on how funding will be applied to overall marketing campaign media formats (radio, print, social, transit) and match across localized campaigns.
- Create a media schedule with planned media campaigns for radio, print, social media, transportation, and event advertising.
- Create a staffing plan to support and carry out the campaigns by defining the target customer, reach, frequency, cost, selectivity, and impact.
- Develop and execute memoranda of understanding with project partners regarding execution of campaigns.
- Coordinate work among the various parties and partners.

Products:

- Pro forma budget.
- Media schedule
- Staffing plan
- Memoranda of understanding

[CPR WILL OCCUR DURING THIS TASK. See Task 1.2 for details.]

TASK 4 ADVERTISING, OUTREACH AND SOCIAL MEDIA CAMPAIGNS

Task 4.1: Conduct Social Media and Traditional Media Advertising Campaign

The goal of this task is to reach the target markets through radio, television and social media.

The Recipient shall:

- Design and deploy social media campaigns utilizing Google Adwords, Youtube, and popular social networks. Track zip code and key demographic / cohort boosts.
- Create distinct and complementary print ads, as well as op-eds where possible in local circulars promoting the EV carsharing networks. Approximately 1-2 print ads in key local circulars are expected per quarter.
- Conduct a radio and television campaign that is both broad and focused on key channels such as Hmong TV and Punjabi radio, with public service announcements (PSAs), program interviews/featurettes, etc. Approximately 1-2 radio ads and/or PSAs on key local stations are expected per quarter.

- Prepare and submit a radio ad report that includes but is not limited to date, channel, and media file for radio ads.

Products:

- Copies of social media campaigns along with zip code and key demographic / cohort boosts
- Copies of print ads and op-eds
- Radio ad report

Task 4.2: Deploy Transit and Outdoor Advertising Campaign

The goal of this task is to pursue key transit ad campaigns focused on the target market (the San Joaquin Valley) in concert with key partners in the Central Valley. Many agencies in the San Joaquin Valley have underutilized transit advertising space that can contribute to this campaign.

The Recipient shall:

- Secure transit ads with agencies and providers within Fresno, Tulare and Kern counties. In-bus and exterior ads will be considered, in addition to bus shelter ads, outdoor furniture and digital displays. Approximately four distinct and consecutive transit ad campaigns (of 2-3 months each) are expected (approximately 1 campaign every 6 months).
- Prepare and submit transit ad reports on the activities conducted in the transit campaigns including but not limited to date, operator, media files, route and bus as applicable.

Products:

- Transit ad reports, including copies of transit ads

Task 4.3: Community Outreach, Canvassing, and Education Events (Ambassador Team)

The goal of this task is to implement marketing and outreach strategies in the selected counties and communities.

The Recipient shall:

- Deploy a team of ambassadors across Fresno, Tulare, and Kern counties, who will lean heavily on coordination with existing staff resources committed to the CSMN and Valley Go projects. This unified team will attend community events throughout the project area and will design a series of focused community forums on EV programs throughout the Central Valley. In specific instances, this team may also be deployed to canvas specific neighborhoods to share information about nearby resources (mobility programs and/or EVSE). The team will also implement larger carsharing and EV demonstrations. Printed material (flyers, door hangers) and print mailers will accompany this task.
- Schedule at least 7 demonstrations at events across the three counties. These events will feature EVs contributed by ValleyGO and CSMN fleets, and will be coordinated closely with event staff and will be prominently featured as part of the event/program (3 per year/1 every 4 months).

- Prepare and submit a demonstration log report that includes but is not limited to: date, place, organizer, photos, sign-ins.
- Schedule at least 12 community forums (6 per year/ 1 every other month). These forums will be conducted as standalone events in coordination with community partners and will be heavily promoted in advance in partnership with public sector partners.
- Prepare and submit a community forum log report that includes but is not limited to: date, time, place, organizer, photos, sign-ins.
- Participate in at least 20 festivals and events (10 per year/ 1 every 30-45 days), including tabling and other promotional activities.
- Prepare and submit a festival and event log report that includes but is not limited to: date, time, place, organizer, photos, and other media files.
- Conduct canvassing and print mailer mini-campaigns to accompany key events.
- Prepare and submit a canvassing ad report that includes but is not limited to: mailer date, zip codes, media file.

Products:

- Demonstration log report
- Community forum log report
- Festival and event log report
- Canvassing ad report

[CPR WILL OCCUR DURING THIS TASK. See Task 1.2 for details.]

TASK 5: PLANNING FOR EXPANSION OF CLEAN SHARED MOBILITY THROUGHOUT THE SAN JOAQUIN VALLEY

Task 5.1: Synthesis of Marketing Activities as a Planning Tool

Working with ambassadors and project partners, the goal of this task is to synthesize data captured from trip planning tablets, membership intake, and anecdotal feedback from the project team to map out geographic and modal opportunities to expand shared mobility to other parts of the San Joaquin Valley.

The Recipient shall:

- Prepare and submit a marketing feedback report with appendices that offer an aggregated view of both user and public opinion of the programs.

Product:

- Marketing feedback report

Task 5.2: Drafting and Presentation of Preliminary Expansion Concept

The goal of this task is to develop a preliminary concept for expansion of shared mobility networks, with a particular focus on communities that have not yet been served by work performed under this Agreement.

The Recipient shall:

- Integrate data received from Task 5.1 as well as shared program performance data from the first year of the program into a preliminary expansion concept.
- Prepare and submit an internal analysis memorandum describing this synthesis of feedback from Task 5.1 into recommended next steps for expansion planning.
- Based on feedback from key stakeholders, prepare and submit a map and accompanying PowerPoint indicating potential expansion areas within the San Joaquin Valley (particularly in the Northern end of the Valley).

Products:

- Internal analysis memorandum
- Map and PowerPoint indicating potential expansion areas within the San Joaquin Valley

[CPR WILL OCCUR DURING THIS TASK. See Task 1.2 for details.]

TASK 6: DATA COLLECTION AND ANALYSIS

The goal of this task is to collect operational data from the project, to analyze that data for economic and environmental impacts, and to include the data and analysis in the Final Report.

The Recipient shall:

- Develop data collection test plan.
- Troubleshoot any issues identified.
- Collect data on outreach including number of meetings, calls and other technical assistance or education activities.
- Provide data on potential job creation, economic development, and increased state revenue as a result of expected future expansion.
- Compare any project performance and expectations provided in the proposal to Energy Commission with actual project performance and accomplishments.
- Collect data, information, and analysis described above and include in the Final Report.

Products:

- Data collection information and analysis will be included in the Final Report

STATE OF CALIFORNIA

STATE ENERGY RESOURCES
CONSERVATION AND DEVELOPMENT COMMISSION

RESOLUTION - RE: FRESNO METRO BLACK CHAMBER FOUNDATION

RESOLVED, that the State Energy Resources Conservation and Development Commission (Energy Commission) adopts the staff CEQA findings contained in the Agreement or Amendment Request Form (as applicable); and

RESOLVED, that the Energy Commission approves Agreement ARV-18-030 with the Fresno Metro Black Chamber Foundation for a \$614,945 grant to support the rapid growth of light-duty electric vehicles in the San Joaquin Valley through outreach for electric car-sharing and ridesharing services, electric vehicle marketing and education campaigns, and development of an electric vehicle ambassadorship program; and

FURTHER BE IT RESOLVED, that the Executive Director or his/her designee shall execute the same on behalf of the Energy Commission.

CERTIFICATION

The undersigned Secretariat to the Commission does hereby certify that the foregoing is a full, true, and correct copy of a Resolution duly and regularly adopted at a meeting of the California Energy Commission held on June 12, 2019.

AYE: [List of Commissioners]

NAY: [List of Commissioners]

ABSENT: [List of Commissioners]

ABSTAIN: [List of Commissioners]

Cody Goldthrite,
Secretariat