

# METROPOLITAN TRANSPORTATION COMMISSION LOCAL PUBLIC FLEET ELECTRIFICATION PLANNING TECHNICAL ASSISTANCE: PROGRAM GUIDE 2024 Call for Applications



The Metropolitan Transportation Commission (MTC) invites Bay Area local jurisdictions to apply for Local Public Fleet Electrification Planning Technical Assistance. This program provides local public agencies with consultant assistance for public fleet electrification planning, such as assessing fleets, fleet replacement options, fueling and charging needs, infrastructure siting, costs and impacts, and transition actions. Local public agencies (including cities, counties, special districts, or other local agencies or districts) in the Bay Area that own and operate five or more vehicles or mobility devices (bikes, scooters, mopeds, etc.) are eligible to apply. The program helps local jurisdictions meet [state mandates](#) to begin transitioning to clean fleets by 2024 and improves their ability to pursue current and future fleet electrification funding.

For this planning assistance program, MTC will administer consultant service contracts to complete fleet electrification planning for selected local jurisdictions. Consultants will deliver a standardized scope of work to assess an agency's fleet and charging needs and prepare a fleet transition and infrastructure plan.

This program is a Climate Initiative funded through the One Bay Area Grant 3 (OBAG 3) to implement Plan Bay Area 2050 Environment Strategy 8 (Expand Clean Vehicle Initiatives) in support of achieving the region's greenhouse gas reduction goals.

## Key Information

- Bay Area local public agencies that own and operate at least five vehicles or mobility devices are eligible to apply by [submitting an application form](#)
- Applications are simple and require only basic information about the fleet, key partners, and the need for planning assistance
- MTC will be responsible procuring and contracting with consultants for the selected agencies
- MTC is hosting an online information session about the program on Wednesday, January 17, 2024, 1-2 PM. **Register for the information session at:** <https://bayareametro.zoom.us/meeting/register/tZAKf--trzssH9ljQO0nsr2Oc8XWFFdO3gk>
- **Applications are due Tuesday, February 20, 2024, 11:59 PM**

See further information below. For questions, email James Choe ([jchoe@bayareametro.gov](mailto:jchoe@bayareametro.gov)).

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## Call for Applications Guide

### Program Vision and Goals

The Local Public Fleet Electrification Planning Technical Assistance program is part of MTC's Transportation Electrification (TE) Initiatives, which include \$65 million of investments in four categories:

1. Charging infrastructure – capital grants to expand the deployment of charging infrastructure for EVs and e-mobility options

2. Electric bikeshare – funding to expand access to electric bikeshare options
3. Local public fleet electrification – consultant technical assistance to help local public agencies conduct fleet transition planning
4. Local planning and regional program strategy – consultant technical assistance for regional and local action planning and program coordination

The Transportation Electrification Initiatives supports [Plan Bay Area 2050](#)'s target of a 19% reduction in per capita greenhouse gas (GHG) emissions in the light-duty transportation sector by 2035. The program helps to achieve this by planning the transition to electric vehicles (EVs), electric mobility devices (e.g., bikes, scooters, mopeds, etc.), and associated charging infrastructure for local public agency fleets.

MTC will procure and contract with consultants who will complete a scope of fleet electrification planning services for selected local public agencies. The standard scope of work prepares successful applicants to meet state mandates for zero emission fleets – regardless of the extent of previous fleet transition planning – by providing the essential components of a public fleet electrification plan. Agencies can also request additional planning services beyond the standard scope; however, additional assistance cannot be guaranteed and will depend on program demand, funding and consultant availability, eligibility, and other factors.

The near-term goals of this assistance are to help local public agencies meet state zero-emission fleet requirements and be positioned to access federal, state, and local funding opportunities for transitioning their fleets and installing charging infrastructure.

### **Planning Technical Assistance Scope of Work**

MTC will administer consultant contracts to complete eligible public fleet electrification planning services for selected local public agencies. The standard scope of work is anticipated to include the following tasks (with examples of activities that may be performed as part of each task):

#### **1. Fleet Baseline Conditions**

- A. **Review existing fleet plans and applicable policies** (e.g., review prior fleet electrification and transition plans, climate action plans, Advanced Clean Fleets rule, CALGreen codes)
- B. **Assess current fleet** (e.g., assess fleet inventory, vehicle types, duty cycles, fueling, communities served, replacement plans, maintenance requirements, parking locations)
- C. **Engage fleet stakeholders to understand and address all relevant needs and concerns in developing a robust fleet electrification plan** (e.g., gather input from fleet managers, technicians, operators, health and safety departments, public works, and other relevant departments and stakeholders)

#### **2. Fleet Electrification Assessment**

- A. **Evaluate vehicle and equipment replacement options** (e.g., evaluate existing vehicles and equipment replacement options, potential vendors, costs, and operations and maintenance considerations)
- B. **Evaluate fleet charging needs and locations** (e.g., evaluate vehicle energy requirements, load profiles, charging equipment needs, managed charging options, infrastructure siting, utility interconnection/grid capacity, distributed energy opportunities, and costs)

### **3. Fleet Transition Plan**

- A. **Develop vehicle replacement and procurement plan** (e.g., determine vehicle and equipment replacements, procurement plan, transition timeline, and budgets)
- B. **Develop infrastructure development plan** (e.g., identify project locations, develop site design guidance, identify equipment options, acquire equipment specifications and quotes, and develop project delivery timelines and budgets)
- C. **Coordinate with utility on proposed charging infrastructure** (e.g., seek utility review of proposed charging infrastructure, assess costs, and facilitate necessary utility-side upgrades)
- D. **Develop operations and maintenance plan** (e.g., document fleet and charging infrastructure operations and maintenance requirements, cost estimates, vendor contract policies and responsibilities, and operator and technician training plan)
- E. **Develop data collection and reporting plan** (e.g., identify key metrics, develop reporting plan, and document data collection and analysis approach for vehicle use, charge sessions, equipment uptime, energy consumed, costs, emissions savings, and other key metrics)
- F. **Assess costs and impacts** (e.g., assess vehicle, equipment, construction, infrastructure upgrade, operations, and maintenance costs and savings and evaluate greenhouse gas emissions impacts and cost-effectiveness)
- G. **Develop financing plan** (e.g. identify implementation funding sources, consider revenue generation and innovative financing opportunities, and develop funding plan)
- H. **Develop additional implementation guidance, as needed** (e.g. fleet training material, RFP templates, grantwriting guidance, and vendor contract best practices)

*Please note that the anticipated assistance activities listed above are subject to change. Final scope of work for each selected applicant may also depend on planning already completed by the applicant.*

Participation in this program may require plans to include preferred or required standards or specifications to align with federal, state, regional, and local goals and policies and industry best practices (e.g., uptime targets, data sharing requirements, contract best practices).

#### **Eligible Applicants**

Eligible applicants are Bay Area local public agencies (city, county, public utility, special district, or other local agency or district) that own and operate five or more vehicles or mobility devices (bikes, scooters, mopeds, etc.). Any other public (intra-/inter-departmental, external), private, and nonprofit partners essential to project success should also be identified in the application.

Local agencies with multiple fleets (for example, a city with public works, police, fire, parks and recreation, and public health fleets) should coordinate internally and submit only one application per government entity. Multiple applications received for fleets under one government entity will be requested to consolidate requests.

#### **Program Funding**

Up to \$10 million in funding from the federal Surface Transportation Block Grant (STBG) Program is available for this technical assistance. Local match from project sponsors is not required. Consultants will be providing an estimated \$50,000 to \$250,000 to deliver the standard scope of work for each plan.

## How to Apply

Eligible applicants should [download and complete the application form](#), a simple form to collect basic information about the applicant's assistance requested for public fleet electrification planning. As noted in the Eligible Applicants section, submit only one application for all fleets owned and operated by a public agency.

Email applications to **James Choe** ([jchoe@bayareametro.gov](mailto:jchoe@bayareametro.gov)) by **February 20, 2024, 11:59 PM**.

MTC staff will review the application information for eligibility and request additional information as needed. Public agencies will be selected and/or prioritized for assistance based on the project need, project benefits, equity impacts, fleet size and composition, commitment of fleet staff and partners, completeness of information provided, alignment with MTC and program goals, program demand, program funding availability, consultant capacity, and similar factors.

## Post-Selection Process Roles and Responsibilities

- MTC will add or amend the project in the Transportation Improvement Program (TIP)
- MTC will obtain funding obligation and authorization to proceed (Caltrans E-76)
- MTC will confirm the scope of work to be delivered with the public agency (project sponsor)
- Local public agency staff will attend a technical assistance awardee meeting
- MTC will select and contract with consultants to deliver planning technical assistance to the local public agency
- Local public agency staff will provide necessary staff time, data, deliverable review, input, reporting, and other information and resources necessary for project delivery consistent with the project budget and schedule
- Local public agency staff will coordinate any necessary engagement with the public, other agency departments, advisory groups (working groups, technical advisory committees, etc.), and/or councils or decision making bodies
- Local public agency staff and consultants will provide status updates in writing and/or meetings, as needed by MTC staff
- Local public agency staff and consultants will complete plans within 18 months of project initiation

## Schedule

Activity	Date
Call for Applications announcement release	January 11, 2024
Program information session (by Zoom)	January 17, 2024, 1-2 PM Register at: <a href="https://bayareametro.zoom.us/meeting/register/tZAKf-trzssH9ljQO0nsr2Oc8XWFFdO3gk">https://bayareametro.zoom.us/meeting/register/tZAKf-trzssH9ljQO0nsr2Oc8XWFFdO3gk</a>
<b>Application Deadline</b>	<b>February 20, 2024, 11:59 PM</b>
Application review	February-March 2024
Commission approval (tentative)	April 2024
Planning assistance project kick-off (tentative)	Summer 2024

# Application Information Required

[Download application](#) and email to James Choe ([jchoe@bayareametro.gov](mailto:jchoe@bayareametro.gov)).

## Applicant Information

1. Public Fleet Project Sponsor
  - Local Public Agency
  - Main Point of Contact Name
  - Title
  - Department
  - Email
  - Phone
  
2. List all local government or public agency departments or divisions that are responsible for any fleet vehicles (e.g., public works, police, fire, public health, parks and recreation, etc.). Please note that the inclusion of *all* departments that are responsible for any public fleet vehicles and their operations within the government agency’s jurisdiction is encouraged.

Department	Contact Name	Role or Responsibility (related to this project)	Email

3. List any other internal partners (e.g., fleet manager, Mayor’s office, contract administrator, project manager) and external partners (e.g., advisory bodies, vendors) that are expected to be involved with this project. Please note that multidisciplinary teams with partners and stakeholders necessary for addressing the *entire* public fleet owned and operated by the local government agency are encouraged.

Department / Organization	Contact Name	Role or Responsibility (related to this project)	Email

## Planning Technical Assistance Needed

4. Please describe why planning technical assistance is needed, including:
  - Relevant local, regional, state, or federal policies and goals
  - Prior fleet electrification planning and implementation efforts by the public agency and how this planning assistance integrates with those efforts
  - Unique circumstances or challenges that require planning assistance
  - Anticipated quantitative and qualitative benefits of planning (e.g., anticipated number of users, impacts on disadvantaged communities, estimated reduction in emissions, etc.)
  
5. The following proposed scope of work will be provided to all selected recipients. Please refer to the program guide for more information about the scope of work. If you feel that a particular activity is **not** needed for your fleet, please explain why in the box next to that task. Otherwise, leave the box blank. *(Please note that the scope of work may be updated before project initiation)*

### 1. Fleet Baseline Conditions

- A. Review existing fleet plans and applicable policies \_\_\_\_\_
- B. Assess current fleet \_\_\_\_\_
- C. Engage fleet stakeholders \_\_\_\_\_

**2. Fleet Electrification Assessment**

- A. Evaluate vehicle and equipment replacement options \_\_\_\_\_
- B. Evaluate fleet charging needs and locations \_\_\_\_\_

**3. Fleet Transition Plan**

- A. Develop vehicle replacement and procurement plan \_\_\_\_\_
- B. Develop infrastructure installation plan \_\_\_\_\_
- C. Coordinate with utility on proposed charging infrastructure \_\_\_\_\_
- D. Develop operations and maintenance plan \_\_\_\_\_
- E. Develop data collection and reporting plan \_\_\_\_\_
- F. Assess costs and impacts \_\_\_\_\_
- G. Develop financing plan \_\_\_\_\_

6. Describe any additional services beyond those listed above that are needed. MTC cannot guarantee additional services beyond the standard scope can be provided. Please note that architectural and engineering (A&E) or construction services, such as producing line drawings, acquiring permits, and acquiring equipment, **cannot** be funded through this program.

**Fleet Description**

7. List all facilities at which fleet vehicles are domiciled (i.e., parked when not in use) and provide the following information for each facility:
- a. **Descriptive facility name** (e.g., Jones Corp Yard, Civic Center Garage, Center City Health Clinic) and address, if available
  - b. The **number of vehicles** at each location (if exact numbers are not known, close approximations are acceptable)
  - c. Indicate if the facility houses **light-duty vehicles (LDVs)**, and/or
  - d. Indicate if the facility houses **medium-/heavy-duty vehicles (MD/HDVs)**
  - e. Any **additional information** that might be helpful in reviewing your request or developing a fleet transition plan for that location (e.g., description of the department(s) or types of vehicles, the fueling infrastructure at the facility, barriers or opportunities at the site, unique characteristics about the facility or vehicles domiciled there, etc.)
  - f. **Add additional rows** as necessary and provide **total number of vehicles** at the bottom.

a. Facility	b. Number of vehicles	c. Includes LDVs? (Yes or No)	d. Includes MD/HDVs? (Yes or No)	e. Additional information
<b>f. TOTAL</b>	<b>[sum of all vehicles]</b>			

8. Are there facilities or department fleets that are not included in this planning request? If yes, please list the facilities and/or departments, the number of vehicles, and the reason they are not being including in this request.
9. (Optional) Please provide any additional information or notes that should be considered in your request.