

APPENDIX A

APPLICATION

**LIGHT-DUTY FINANCING ASSISTANCE IN
DISADVANTAGED COMMUNITIES
PILOT PROJECT
(FINANCING ASSISTANCE PILOT PROJECT)**

**FISCAL YEAR 2014-15
LOW CARBON TRANSPORTATION
INVESTMENTS**

California Air Resources Board
Mobile Source Control Division
March 25, 2015

California Environmental Protection Agency

 **Air Resources Board**

APPLICATION

Print clearly or type all information on this application.

1. Project: Click here to enter text.		
2. Company Name/Air District/Organization Name/Individual Name: Click here to enter text.		
3. Entity Type: Click here to enter text.		
4. Contact Name and Title: Click here to enter text.		
5. Person with Contract Signing Authority (if different from above)/Air Pollution Control Officer (APCO): Click here to enter text.		
6. Mailing Address and Contact Information:		
Street: Click here to enter text.		
City: Click here to enter text.	State: Click here to enter text.	Zip Code: Click here to enter text.
Phone: (XXX) XXX-XXX		Fax: (XXX) XXX-XXX
E-mail: Click here to enter text.		
<input type="checkbox"/> I have read and understood the terms and conditions of the Sample Grant Agreement.		

I hereby certify under penalty of perjury that all information provided in this application and any attachments are true and correct.

Printed Name of Responsible Party or APCO: Click here to enter text.	Title: Click here to enter text.
Signature of Responsible Party or APCO:	Date:

Third Party Certification (if applicable)

I have completed the application, in whole or in part, on behalf of the applicant.

Printed Name of Third Party: Click here to enter text.	Title: Click here to enter text.
Signature of Third Party:	Date:
Amount Being Paid for Application Completion in Whole or Part: Click here to enter text.	Source of Funding to Third Party: Click here to enter text.

Attachment 1: APPLICANT QUALIFICATIONS

1. Qualifications Narrative: Provide an attachment describing your experience and expertise developing, implementing, or administering similar financial assistance projects and working with or outreaching to disadvantaged or other communities and identify how this background will enable you to efficiently and effectively implement the Financing Assistance Pilot Project.
2. Staff Information: Include information for each staff member to be involved in developing, implementing, or administering the Financing Assistance Pilot Project. Clearly identify staff proposed for day-to-day project administration. Attach resumes.

Name:	Hourly rate:
Phone:	Email:
Title:	
Expected duties:	

This table is a suggestion. If more room is needed, the information may be recreated by the applicant and attached.

3. Subcontractor Information: Applicants may partner or subcontract with other entities. However, responsibility for compliance with the grant terms and deliverables lies with the primary applicant. Provide the names and information for any and all subcontractors and partners. Attach resumes and letters of commitment.

Name:	Hourly rate:
Phone:	Email:
Title:	
Expected duties:	

This table is a suggestion. If more room is needed, the information may be recreated by the applicant and attached.

Attachment 2: PROPOSED BUDGET

Describe the proposed budget for completing the tasks of the Financing Assistance Pilot Project, consistent with the Sample Grant Agreement, your Project Implementation Plan, and the requirements of the solicitation. Applicant should be aware that the available funds may be awarded to more than one grantee.

The proposed budget must include all estimated labor and material costs associated with managing the project, a description of any applicable commitments for in-kind services and match funding, records retention, and transfer to ARB. The budget must include total costs to process loans, educate lower income consumers in vehicle purchase or lease, price buy-down funding allocation and number of vehicles projected to fund. If a battery electric vehicle (BEV) is being purchased or leased, financial assistance of up to \$2,000 may be requested for purchase and installation of electric vehicle supply equipment (EVSE), include process for issuing this financial assistance. The proposed budget must also include a cost breakdown per loan, price buy-down funding, or other financial assistance instrument. Applicants may use the Sample Proposed Budget to summarize their proposed budget or their own worksheet.

The proposed budget should identify any in-kind services to be offered, resources, or services contributed by the Grantee to manage the project but not be charged to the Financing Assistance Pilot Project. Be specific, i.e., itemize staff time or other costs that are being committed. In-kind services provided in the form of outreach efforts must be appropriate for community being served. In-kind services committed in this application must be documented by the Grantee in the Final Report.

Match funding, not required but encouraged, refers to funds contributed by the Grantee to the Financing Assistance Pilot Project to fund the loan or other proposed financing assistance instrument for vehicle purchase, lease or in conjunction with a BEV purchase, EVSE purchase. Only direct match funding contributed to the Financing Assistance Pilot Project will be considered in scoring this application. The applicant must include a letter describing and authorizing any proposed match funding commitment as part of this application.

All expenses and other funding must be estimated and identified. Provide details on budget and include as attachments, as necessary.

2-1: Sample Proposed Budget

(Applicant may modify this sample budget to meet their specific needs. This page may also be edited, or deleted if not used)

Direct Labor	Hours	Rate	Total		In-kind Match
Program Manager	_____ @	_____	_____		
Staff Assistant	_____ @	_____	_____		
Technician	_____ @	_____	_____		
Clerical	_____ @	_____	_____		
				\$ _____	\$ _____
Subcontractor(s) cost Itemized				\$ _____	\$ _____
Indirect Costs (Overhead and Fringe Benefits)					
Overhead rate		_____	_____		
Fringe Benefits		_____	_____	\$ _____	\$ _____
Direct Costs (except labor)					
Travel Costs			_____		
Equipment and Supplies			_____		
Other Direct Costs (itemized per loan, or grant)			_____		
Record Retention			_____		
Record Transfer to ARB			_____		
				\$ _____	\$ _____
TOTAL COSTS				Total	Total

TOTAL COSTS

TOTAL \$ _____

Attachment 3: PROJECT IMPLEMENTATION PLAN

Provide a Project Implementation Plan for completing tasks required in the Scope of Work of the Financing Assistance Pilot Project Grantee as outlined in Exhibit A of the Sample Grant Agreement. Be specific. Where applicable, provide examples of past successfully completed similar tasks. The plan must include at a minimum:

1. Narrative that presents a clear and concise description of how key tasks will be completed.
2. Timeline for plan implementation that identifies key tasks and milestone dates from inception through project completion.
3. Disadvantaged community that the project intends to benefit, identified by zip code and census tract.
4. Plan for project outreach to the identified disadvantaged community and education (fiscal, vehicle, and consumer protections) to lower income consumer.
5. Data the project will collect from initial and on-going project participant surveys, the type of financing assistance programs serve the project, vehicle and financing assistance information (for example, loan and terms of loan, price buy-down amounts, etc.), demonstration of educational requirements being met, benefits to the identified disadvantaged community, and how this data will be reported to ARB.
6. Explanation of who the project participants will be and how the project will benefit the disadvantaged community.

7. Number of advanced technology vehicles purchases or leases projected and a cost per loan or transaction. Including process for issuing financial assistance of up to \$2,000 for EVSE purchase and installation.
8. Describe the long-term vision or goals to sustain the program in the future.

Attachment 4: APPLICANT RESOURCES TO IMPLEMENT THE PROJECT

Identify the staff, infrastructure, financing assistance funding, and other available resources. Identify key personnel who will be working on the project and if there is a subcontractor a description of the subcontractor role.

Attachment 5: CONFLICT OF INTEREST DECLARATION

All applicants must disclose any Conflict of Interest in fulfilling the duties of the Financing Assistance Pilot Project Grantee. Summarize your organization's or any subcontractor's current, ongoing, or pending direct or indirect interest, which poses an actual, apparent, or potential conflict of interest with your ability to fulfill the duties of the Grantee. ARB may consider the nature and extent of any potential or apparent conflict of interest in evaluating, considering, or scoring the application and may disqualify the applicant at ARB's sole discretion.

Attachment 6: STD. 204 PAYEE DATA RECORD

Submit a completed STD. 204 Payee Data Record:

<http://www.documents.dgs.ca.gov/dgs/fmc/pdf/std204.pdf>