

**APPENDIX F**  
**MODEL LANGUAGE &**  
**PROCESS CHARTS**

# PROPOSED IMPLEMENTATION PLAN FOR TOP 10 RECOMMENDATIONS

Included for each of the Top 10 Recommendations are overarching actions to achieve the recommendation and implementation steps (e.g., IS1.1).

## Recommendation 1

*Creating emerging mobility options and programs tailored to seniors and working families with kids. Engage with local neighborhoods, school districts, and universities to educate students on how to safely use emerging mobility services. Tailor to specific age groups.*

- **ACTION 1:** Incorporate language in micromobility permit program requiring applicants to demonstrate development of alternative device options and prototypes tailored to seniors and working families.
  - **IS1.1:** See sample permit language from peer cities. Permit language should be specific in what the City discourages and encourages.
  - **IS1.2:** Research available micromobility devices that explicitly serve seniors and people with limited mobility in other jurisdictions,
  - **IS1.3:** Survey and review micromobility programs tailored to the budgets and needs of people with low income.
  - **IS1.4:** Add language in permit application requiring companies to speak to how they are serving these populations based on availability of products.
  - **IS1.5:** Permit should have clear metrics and be used as a regulatory mechanism to also be used to create city policies.
- **ACTION 2:** On the Community Advisory Board, include representatives from disability, older adults, and family support advocacy groups to engage with city staff and private mobility providers to identify needs and create potential design solutions.
  - **IS2.1:** Determine a scope for the working group.
  - **IS2.2:** Partner with CBOs working with people with disabilities, seniors, and families to conduct a community needs assessment. Model after needs assessment process conducted by MTC and TransForm as part of their mobility hubs project.
  - **IS2.3:** Create implementation plan for community-identified strategies by identifying resources, and how to measure potential solutions.
- **ACTION 3:** Partner with Walk and Roll program and other local school districts to create training programs to educate K-12 students and families on micromobility requirements (e.g., age limit and driver's license) and safe riding protocols.
  - **IS3.1:** Make an outreach list of Walk n Roll and relevant schools that would participate in programs.

**San Jose Emerging Mobility Action Plan Task 6 – Process Workflows (Top 10 Recommendations)**  
San Jose Department of Transportation

- **IS3.2:** Integrate with Walk and Roll and SRTS curricula and VTA travel trainings.
- **IS3.3:** Prepare what the Scope training program and develop a handout for reaching out to schools would look like (including provisions, helmets, parent consent, no more than one person per mode, etc.) to include as a proposal when reaching out to schools.
- **IS3.4:** Collaborate with micromobility companies to adapt their existing safety training programs for K-12 students and families and incorporate into training program.
- **ACTION 4:** Ensure engagement extends to schools that may not be in an area where micromobility utilization is high.
  - **IS4.1:** Utilize KPI analysis to see where there is heavy traffic, low public transport options, and/or low micromobility use.
  - **IS4.2:** Overlay Walk and Roll outreach list with the areas identified through the KPI analysis; identify whether schools are missing.
  - **IS4.3:** Identify points of contact at underserved schools and prepare outreach plan to schedule trainings at these locations (points of contact could include county Office of Education).
  - **IS4.4:** Deliver trainings in coordination with Walk n Roll.
- **ACTION 5:** Partner with SJSU, SJCC, EVC transportation, student groups, and private mobility providers to create training programs to educate students on how to safely use emerging mobility options.
  - **IS5.1:** Create a training program description in collaboration with SJSU, SJCC and EVS.
  - **IS5.2:** Collaborate with emerging mobility companies to adapt their existing safety training programs (e.g., correct parking protocols, prevent drunk driving, etc.) for college students.
  - **IS5.3:** Work with emerging mobility companies to provide incentives for completing trainings.
  - **IS5.4:** Delivery training as part of campus orientation week.
  - **IS5.5:** Set up monthly meetings with campus transportation staff to discuss the efficacy of trainings.
- **ACTION 6:** Identify grant funding for pilot program. Grant funding can also include money to provide educational outreach through CBOs, schools, and universities on how to safely use pilot services. Other grant opportunities to consider include health, parks, climate change/sustainability grants. Consider low carbon transit operations program. Value capture is also being discussed in relation to TNC strategies for Bart Phase 2.
  - **IS6.1:** Create a list of relevant grants with submission deadlines.
  - **IS6.1:** Collaborate with SJ DOT grant team to formalize an internal grant tracking process.

## Recommendation 2

*Create easy to use options for services that are available and easily understood and used by low-income communities, undocumented people, seniors, persons with disabilities. Options may include pay stations/kiosks, partnerships with local businesses, and card-based payment systems that allow cash filling and can be used across providers.*

- **ACTION 1:** Update micromobility permit regulations to require alternative payment options (e.g., cash-based, prepaid cards, PayPal) and permission to use AB-60 drivers licenses. Ensure alternative payment options are known to users as well.
  - **IS1.1:** Collaborate with Cal-ITP and Clipper to determine feasibility of incorporating single card-based payment option for different transportation options.
  - **IS1.2:** Coordinate with City’s Attorney’s office on appropriate avenues for mandating a particular payment method (e.g. ordinance or permitting language?)
  - **IS1.3:** Update current permit language building on these conversations
- **ACTION 2:** Update micromobility permit regulations to require permit applicants to submit a community outreach plan outlining strategies for marketing and expanding low-income discount programs and alternative payment options.
  - **IS2.1:** Draft language that addresses equitable practices.
  - **IS2.2:** Draft language that outlines regulations and guidelines for the type of community outreach plan is desired.
  - **IS2.3:** Incorporate into permit language requirement for outreach plan
  - **IS2.4:** Incorporate a compliance mechanism requiring submitting proof of outreach and resulting in increasing micromobility use among underserved populations within 12 months of launching
- **ACTION 3:** Advertise that marketing materials, customer service, website, mobile app, and phone services are offered in San Jose’s core languages (English, Spanish, and Vietnamese).
  - **IS3.1:** Identify languages spoken other than English in San Jose by utilizing Census data.
  - **IS3.2:** Identify opportunities to include language requirements for other emerging mobility services that fall outside of a permit program (e.g., ZipCar, EV charging, sidewalk robots, etc.).
  - **IS3.3:** Identify opportunities to continue to advocate for adding Chinese and Tagalog into the multilingual requirements.
  - **IS3.4:** Identify languages spoken other than English in San Jose by utilizing Census data.

**San Jose Emerging Mobility Action Plan Task 6 – Process Workflows (Top 10 Recommendations)**  
San Jose Department of Transportation

- **IS3.5:** Identify opportunities to include language requirements for other emerging mobility services that fall outside of a permit program (e.g., ZipCar, EV charging, sidewalk robots, etc.).
- **IS3.5:** Identify opportunities to continue to advocate for adding Chinese and Tagalog into the multilingual requirements.
- **ACTION 4:** Advertise discount programs on San Jose's website (similar to PBOT model).
  - **IS4.1:** Determine use cases for advertising discount programs.
  - **IS4.2:** Engage with staff in charge of website updates to identify the most appropriate location on the City website.
  - **IS4.3:** Advertise in top languages spoken other than English in San Jose.
- **ACTION 5:** Map community-identified local businesses or areas of significance to site potential kiosk locations as well as existing pay stations, kiosks, and businesses where Clipper Card can be purchased and refilled.
  - **IS5.1:** Analyze utilization of pay stations, kiosks, and businesses where Clipper cards are purchased and refilled (e.g., number of Clipper Card purchases & refills/month).
  - **IS5.2:** Look for hubs of activities such as gas stations, mobility hubs, hospitals, etc. with community members where additional pay stations or kiosks could be located.
- **ACTION 6:** Engage with CalSTART to determine feasibility of integrating mobility options as part of Cal-ITP initiative.
  - **IS6.1:** Set up meetings with CalSTART to determine how a partnership can support mobility goals overall.

## Recommendation 3

*Engage with CBOs to conduct racial equity analyses, and engage with CBOs prior to major program, policy, and project decisions like deployment requirements. Work in partnership with community groups to identify evaluation criteria to assess alignment between emerging mobility program and pilots and community needs. Establish minimum service levels by geography for all services. Evaluate the performance of Emerging Mobility providers in meeting community needs at the midpoint and end of a project or pilot in partnership with CBOs. Make evaluation reports publicly available to community members.*

- **ACTION 1:** Formalize internal practice of conducting racial equity analysis of all programs at the end and before the start of a new pilot phase or pilot program. This can be integrated as part of the evaluation process and should include the community advisory board.
  - **IS1.1:** Reference the GARE framework to update project management protocols.
  - **IS1.2:** Incorporate into project management training.
  - **IS1.3:** Develop racial equity evaluation process and outline role of CAB in shaping potential projects.
- **ACTION 2:** Identify potential funding sources to develop and compensate members of a community advisory board. Consider onboarding, capacity-building, and materials development costs. Determine whether permit fees from pilot programs can be used.
  - **IS2.1:** Create a list of relevant grants with submission deadlines.
  - **IS2.2:** Identify staff that would oversee developing grant submissions.
  - **IS2.3:** If permit fees can be used, identify how much money would need to be raised in permit fees and how this would translate to a per-trip fee.
- **ACTION 3:** Establish a community advisory board dedicated to advising the DOT's Emerging Mobility Team's work.
  - **IS3.1:** Identify the desired number of members and desired types of representation.
  - **IS3.2:** Identify a process for selecting a chairperson for the community advisory board.
  - **IS3.3:** Identify goals and desired outcomes for the board.
  - **IS3.4:** Plan for logistics (time, where they are held, length of meetings, meeting structure).
  - **IS3.5:** Identify ongoing recruitment methods.
  - **IS3.6:** Create template MOU modeled after ETF MOU from this project.
- **ACTION 4:** Work with community advisory board to establish program evaluation criteria for all emerging mobility programs based on an assessment of program performance in the City's equity priority areas.

**San Jose Emerging Mobility Action Plan Task 6 – Process Workflows (Top 10 Recommendations)**  
San Jose Department of Transportation

- **IS4.1:** Work with the board to identify priority areas based on performance evaluation of existing Communities of Concerns, supporting them with analysis to inform selection to inform decision making.
- **IS4.2:** Work with the board to develop evaluation criteria, supporting them with analysis to inform decision making.
- **ACTION 5:** Determine whether established measures of equity (e.g., equity priority areas) are in alignment with broader community objectives.
  - **IS5.1:** Undertake a community engagement process with community advisory board to get feedback on priority areas and evaluation criteria.
  - **IS5.2:** Include mapping and analysis of where evaluation criteria are lacking in equity priority areas.
  - **IS5.3:** Finalize equity priority areas and evaluation criteria.
- **ACTION 6:** Document racial equity analysis and publish results in a format that is accessible to community members.
  - **IS6.1:** Establish location on the San Jose website for sharing emerging mobility performance data at midpoints and ends of pilot projects and with a regular cadence for ongoing projects and services.
  - **IS6.2:** Make sure resources are available in multiple languages and are distributed to CBOs by email.

## Recommendation 4

*Create funded public education and promotion program, in partnership with paid community members to educate and spread awareness about emerging mobility services. Include vouchers and discounts to CBOs to give to community members to help familiarize people with emerging mobility services and programs.*

- **ACTION 1:** Identify potential external funding sources (e.g., grants and permit fees) to for training and promotion programs. Funding should cover hiring, training, and compensation to community ambassadors; materials development; and community engagement event logistics.
  - **IS1.1:** Assess both public and private funding sources and make a list of potential options.
  - **IS1.2:** Identify staff that could pursue individual potential funding opportunities.
  - **IS1.3:** Include health, parks, climate/sustainability grants, as well as Measure B, ATP, OBAG, and BAAQD. Consider low carbon transit operations program. Value capture is also being discussed in relation to TNC strategies for Bart Phase 2.
  - **IS1.4:** Identify whether permit fees or other sources of company support can be used to pay for hiring, training and compensation of community ambassadors.
- **ACTION 2:** Develop an educational curriculum in partnership with CBOs and private mobility providers that encompasses different emerging mobility modes.
  - **IS2.1:** Make a list of possible CBOs and social service organizations to partner with to organize and conduct trainings.
  - **IS2.2:** Develop training curriculum could including an overview of emerging mobility services, how sign up and membership/payment works, how to make bookings, and reservations, and what kinds of trips or services may be conducive to different types of EM options, how to ride and park a device, how to contact emerging mobility providers if an issue arises, etc.
  - **IS2.3:** Convene a meeting with CBOs to review curriculum and secure buy-in for co-hosting trainings.
  - **IS2.4:** Utilize the educational curriculum developed in the previous step to set minimum requirements for training session content.
  - **IS2.5:** Require companies to deliver training to members of the public.
- **ACTION 3:** Identify opportunities to implement education programs before and during pilot programs.
  - **IS3.1:** Include coordination with established training programs in protocols or requirements for pilot projects and launch of new permitted services.



**San Jose Emerging Mobility Action Plan Task 6 – Process Workflows (Top 10 Recommendations)**  
San Jose Department of Transportation

- **IS3.2:** Develop a detailed protocol that can be adapted to different modes and project types that can be given to consultants or EM providers at the launch of pilots or services.
- **IS3.3:** Train providers on the requirement to provide training to the public on EM (see previous step).
- **IS3.4:** Include this requirement in standard RFP language where relevant.
- **ACTION 4:** Partner with permitted emerging mobility providers to provide discounts and vouchers at community-driven education programs.
  - **IS4.1:** Create a contract with mobility providers to outline what type of discount vouchers can be created and terms in which they can be used (e.g., trips to engagement events or training).
  - **IS4.2:** Determine whether where incentives to mobility providers would be needed based on community outreach and data analysis on amount of subsidy would make these modes affordable to residents.

## Recommendation 5

*Create a community program to better integrate transit and emerging mobility, ensuring EM complements other transportation options. Create community programs connecting services to transit, including a community rideshare program managed by CBOs.*

- **ACTION 1:** Engage with the community advisory board to identify potential projects focused on first- and last-mile connections to transit (e.g., microtransit).
  - **IS1.1:** Co-create evaluation criteria to which projects would most benefit from first-and last-mile connections.
  - **IS1.2:** Evaluate feasibility of conducting a pilot program at new/existing affordable housing developments near major rail stations or key transfer points.
  - **IS1.3:** Identify third-party partners or mobility companies that may deploy shared FMLM connection if the City were to provide on or off-street parking.
- **ACTION 2:** Collaborate with the community advisory board, the broader community, VTA, Caltrain, and BART to determine project scope and design.
  - **IS2.1:** Identify CBOs who can leverage their engagement with the broader community to provide feedback on evaluation criteria and project prioritization.
  - **IS2.2:** Educate community members around importance regarding emerging mobility as a of first- and last-mile connection to transit and solicit feedback on a potential emerging mobility project (including soliciting feedback on which mode should be deployed).
  - **IS2.3:** Engage with agencies and non-profits who have successfully won funding for community rideshare case studies to understand implementation challenges.
- **ACTION 3:** Apply for California Climate Investments (CCI) program (Sustainable Transportation Equity Project, Transformative Climate Communities Program, Clean Mobility Options).
  - **IS3.1:** Collaborate with community advisory board and other CBOs interested in participating in community rideshare program to submit grant application.
- **ACTION 4:** Identify CBO(s) interested in overseeing a community rideshare program. Work with CBOs to apply for CCI funds for non-profits to fund potential community rideshare program.
  - **IS4.1:** Create a list of interested CBOs.

- **IS4.2:** Work with the CBOs to create guidelines and goals needed to oversee a community rideshare program.

## Recommendation 6

*Establish workforce development programs to connect low-income residents and youth to emerging mobility-related job opportunities. Establish local hire requirements targeting underserved communities.*

- **ACTION 1:** Encourage private mobility providers to attend collegiate and citywide career fairs. Create incentive or requirements for local hiring in permitting language.
  - **IS1.1:** Research funding sources for an incentives and partnerships for mobility providers to offer internship programs or hire locally within San Jose (reducing fees or expanding service areas).
  - **IS1.2:** Add language to permitting documents as applicable stipulating a threshold for local hiring.
  - **IS1.3:** Work with City Attorney’s office to identify potential incentives for local hiring through permit programs.
- **ACTION 2:** Conduct a study to identify observed and anticipated shifts in manufacturing, warehousing, and trucking industries within San Jose in partnership with local businesses, trade tech schools, and community colleges.
- **ACTION 3:** Engage with major manufacturing and warehousing employers as well as large and small trucking companies to understand concerns related to job loss and displacement.
- **ACTION 4:** Collaborate with Work2Future to identify schools with existing partnerships/internship programs with emerging mobility companies to identify models that can be used for other schools.
  - **IS4.1:** Make an outreach list of schools that would be interested in partnering with emerging mobility companies.
- **ACTION 5:** Create a list of possible pilot programs for workforce development.
  - **IS5.1:** Identify grants that could support the pilots.
  - **IS5.2:** Create an evaluation process to see the effectiveness of each pilot program.

## Recommendation 7

*Create community benefits programs funded by fees charged to emerging mobility providers. Types of benefits will be informed by the community but may include discounts for CBOs, funding/sponsoring education programs and engagement efforts, funding promotions programs, and investments that support multimodal travel.*

- **ACTION 1:** Estimate the amount of revenue that would be desired for community benefits and how much an estimated fee per ride would be.
  - **IS1.1:** Create a community engagement process to identify projects that could be funded from permit fees for mobility providers and identify the greatest priorities.
  - **IS1.2:** Identify key CBOs with engaged constituency currently underserved by emerging mobility.
  - **IS1.3:** Identify source of funding to pay CBOs and their constituency for their feedback.
  - **IS1.4:** Conduct focus group with CBOs and community members on potential benefits to solicit feedback on most helpful program.
  - **IS1.5:** Based on community feedback, determine the cost of the top benefit
- **ACTION 2:** Identify whether such a fee could be included for currently permitted services or amend permitting for future approvals.
  - **IS2.1:** Engage with City Attorney’s Office to identify pathways for expanding use of permit fees beyond program administration (see LADOT, SFMTA, and PBOT as examples).
  - **IS2.2:** Create a fee structure for different types of permitted services.
  - **IS2.3:** Update permit language accordingly.
- **ACTION 3:** Consider whether part of the fee could be used to support workforce development or CBO education and outreach efforts that are part of other recommendations.
  - **IS3.1:** Create a matrix of all recommendations that are proposed to include funding from permit fees and estimated fee amounts.

- **IS3.2:** Determine whether there is an upper limit to acceptable total permit fees, considering the need to keep mobility options affordable and competitive with driving options.
- **IS3.3:** Establish community benefit program based on feedback from community, pathways to use fee and other needs.

## Recommendation 8

*Increase transparency around emerging mobility and City use of user data and give users control over how the data collected is used. Establish safeguards to protect user data from being sold.*

- **ACTION 1:** Review permitting process for emerging mobility providers to identify any specifications around the use of user data and ability of users to specify how their data is collected and used.
  - **IS1.1:** Identify data currently collected by companies and any potential privacy concerns
  - **IS1.1:** Identify permitting language modifications that can augment user data privacy give users more control over how their data is collected and used.
  - **IS1.1:** Confer with the City Attorney’s Office to ensure privacy policies are aligned with City, State and Federal policies.
- **ACTION 2:** Determine whether updated requirements can be made to existing permitted services or modify for future permitted services.
  - **IS2.1:** Determine the best way to make users aware of terms they are agreeing to, including a communications plan for informing community members.
  - **IS2.2:** Modify permitting language to reflect recommendations.
- **ACTION 3:** Develop a plan to track or audit mobility provider compliance.
  - **IS3.1:** Determine resources for compliance monitoring and whether additional permit fees are needed for program administration.
  - **IS3.2:** Determine methods of compliance monitoring and develop protocols.

## Recommendation 9

*Consider requirements or incentives for safety equipment.*

- **ACTION 1:** Create list of options for requirements or incentives for safety equipment. Engage with emerging mobility providers to vet/add potential solutions.
  - **IS1.1:** Collect data on micromobility trips and crash data to inform discussion.
  - **IS1.2:** Consider that pricing mechanisms should not encourage riders to speed or take risks if pricing is determined by time. Do not allow companies to incentivize riders based on speed.
  - **IS1.3:** Include safety measures discussed in future permitting guidelines.
- **ACTION 2:** To make micromobility safe, also focus on motor vehicles and how motor vehicles pose risks for all road users.
  - **IS2.1:** Identify a role for infrastructure improvements in conjunction with Better Bike Plan bike infrastructure improvements based on crash data analyzed in the previous step.
  - **IS2.2:** Determine, in conjunction with Better Bike Plan implementation, whether speed limit adjustments are needed to reduce severity of crashes.
  - **IS2.3:** Consider policies and expectations for mobility providers that are consistent across jurisdictions to decrease customer confusion.
- **ACTION 3:** Engage with CBOs to determine which safety equipment is desired and get feedback on potential options.
  - **IS3.1:** In coordination with other CBO/advisory board engagements, get feedback on recommendations to improve micromobility safety.
  - **IS3.2:** Determine availability of grant funding or other sources of funding to provide free or heavily subsidized safety equipment for shared mobility (i.e., helmets).

- **IS3.3:** Distribute helmets or other safety equipment through CBOs.

## Recommendation 10

*Including emerging mobility options in new housing developments to help reduce parking.*

- **ACTION 1:** Study which types of housing developments would utilize EV charging and bike share stations by looking at indicators such as mode share preference and income.
  - **IS1.1:** Utilize Census data to map out housing type and average household income.
  - **IS1.2:** Create a survey to see what type of households would be most interested in EV charging and bike share stations. Determine level of support, as well as challenges to adoption of zero-emission modes
  - **IS1.3:** Determine whether EV readiness ordinance for the construction of new parking facilities and/or expansion of bike share access would be appropriate based on survey feedback
- **ACTION 2:** Collaborate with DOT planning to identify opportunities to incorporate bikeshare stations, EV carshare, and discounts/passes to TDM menu.
  - **IS2.1:** In collaboration with DOT, determine which incentives and parking reductions would be appropriate for increased inclusion of emerging mobility options.
  - **IS 2.2:** Determine partnerships with local businesses and/or developers to expand existing TDM programs

# DEVELOPING A COMMUNITY ADVISORY BOARD

## Background

Building off the success of the Equity Task Force's (ETF's) role in the EMAP, the City of San José has identified as need for a permanent Community Advisory Board (CAB) that would help shape the Department of Transportation's projects, pilots, policies, and programs. The City identified a need for a permanent CAB once funding is available, and in the interim, is setting up a framework for a CAB that could be established on a project-by-project basis if funding allows. The following outlines a scope of work to create both a permanent and an interim CAB.

## Proposed Scope of Work

### Task 1: Project Management

City of San José will identify a source of funding to hire a Project Manager with an equity focus within the DOT Director's Office. The City will then develop a job description and responsibilities for the role. The Project manager will be responsible for managing the development and ongoing operation of the CAB and securing a source of funding for the permanent paid board.

- **Deliverable:** New hire of an equity-focused Project Manager, written description of responsibilities

### Task 2: Funding for CAB

The Project Manager will work with the existing DOT grant team to identify potential sources of funding for a permanent CAB. The Project Manager will also assess alternative forms of funding, including permit fees, general fund, or other potential sources. Sources of funding will be compiled into a tracker. As opportunities arise, the Project Manager will seek funding to form a permanent CAB.

The Project Manager will work with DOT staff to determine whether there is funding to establish temporary activations of the CAB in conjunction with planned DOT projects, funded through the budgets for those projects.

- **Deliverable:** Tracker of CAB funding sources; submit grant applications as relevant; scope language for project-based activations of the CAB for insertion into planned DOT project scopes as relevant

### Task 3: Community Advisory Board Framework

The Project Manager will draft a framework detailing the mission, goals, and priorities of the CAB. The outline will include desired number of members, types of representation, process for chairperson selection and board member term lengths and may be informed by the Community Leaders Interview and ETF Selection Process from the EMAP, which



are provided in Appendix B. EMAP ETF members or community partners will review and provide feedback on the CAB work plan.

- **Deliverable:** Framework for establishing the CAB (slide deck)

#### **Task 4: Community Advisory Board Recruitment Plan**

The Project Manager will update the CAB framework based on feedback provided in Task 3. Building on the framework, the Project Manager will draft a work plan outlining the intended recruitment strategy. The recruitment strategy will include a mechanism for community-led input on the selection of CAB members. Recruitment will include social media posts, outreach to council members, and advertising in local media. The Project Manager will reach out to previous ETF members to raise awareness of the potential roles. The draft recruitment plan will be presented to the ETF and community partners for feedback.

- **Deliverable:** Draft CAB recruitment work plan (and presentation of strategy to ETF for feedback)

#### **Task 5: Community Advisory Board Formation**

Based on feedback from Task 4, if there are anticipated DOT-led projects for which the CAB could be activated, the Project Manager will implement the board recruitment strategy. The Project Manager will work with DOT team to advertise joining the CAB (as outlined in the Task 4 recruitment plan). The Project Manager will make sure the terms stipulated for involvement in the CAB, including the scope of the project and time commitments, are clear in all advertising.

The selection and interview process will utilize the materials developed in Task 4. The Project Manager will lead the selection of the desired number of CAB members (including a chairperson).

The project-based CAB can be paused between active funded projects and can be resumed with the same CAB representatives as funding allows. Once a source of funding is secured for a more permanent CAB, the Project Manager will establish it as an ongoing effort independent of specific projects with allocated funding.

- **Deliverable:** Community Advisory Board instituted on a project-by-project basis and/or permanently

# FIRST MILE LAST MILE EMERGING MOBILITY CONNECTOR

## Background

Throughout the EMAP, a first mile/last mile (FMLM) connector to and from transit was identified as a community need. This scope of work maps out the steps necessary to plan for an effective first/last mile connection, building on a process that puts the input of local community members at the forefront of the project.

## Proposed Scope of Work

### Task 1: Project Management

City of San José will manage grant funding for a proposed study of FMLM connections as well as partnerships from relevant mobility services. Funding sources should include stipends for community members engaged through the Task 3 outreach strategy. The City will work in partnerships with the Santa Clara Valley Transportation Authority (VTA) to coordinate connectivity with existing transit services. The City of San José will designate a Project Manager who will be responsible for managing all activities included in this scope.

### Task 2: Location, Scope and Use Case

Drawing on best practices from around the region and building on recommendations from the EMAP, the Project Manager will identify three communities in East San José where there is an identified need for a first/last mile connector. As defined in the EMAP's recommendations, Districts 5, 7 and 9 score the lowest on the relevant KPIs, indicating that they are potential focus areas for this project. For each of the communities identified, the Project Manager will draw upon previous analysis and outreach efforts to draft three potential use cases with a potential identified mode. Use cases may include connecting communities after dark, during off hours, or providing consistent access to high-capacity transit. Identified modes may include electric or non-electric micromobility, an on-demand shuttle, or rideshare-based solution, depending on geography and need.

The Project Manager will identify potential partnerships with shared mobility providers as part of the use cases. The Project Manager will include potential sources of funding for each use case (including potential grants, permit fees, and public-private partnerships).

The project manager will present these findings at a meeting with City and VTA staff for initial feedback.

- **Deliverable:** Presentation of slide deck outlining three first/last mile connectivity use cases for each of the three potential communities

### **Task 3: Engagement Strategy**

For each community identified, the Project Manager will create a list of relevant community-based organizations and groups that could be engaged on the potential project. The Project Manager will also reach out to potential partners on feasibility of deploying shared emerging mobility in the use cases identified. The Project Manager will develop this partnership list and an engagement strategy in partnership with the City's Community Advisory Board (CAB) if active and available for this engagement. The engagement strategy will include the communities that will be engaged, the mechanism to compensate community members for their time and expertise, as well as the format for engagement (which could include virtual meetings, townhalls, focus groups or other forms of engagement). The Project Manager will develop an engagement plan for each community and use case identified, compiled into a broader strategy.

- **Deliverable:** Engagement strategy summarized into a concise document (up to five pages)

### **Task 4: Community Engagement**

The Project Manager will create meeting material in keeping with the engagement plan developed in Task 3. Materials could include a slide deck, meeting agenda, and handouts depending on the engagement format. The CAB will review all engagement materials and provide feedback as needed and as possible. The Project Manager will coordinate a series of engagement events in the communities identified in the outreach strategy. The Project Manager will coordinate with VTA and potential emerging mobility providers to attend engagement sessions as needed.

- **Deliverable:** Workshop notes from community engagement meetings

### **Task 5: Study Findings and Recommendations**

The Project Manager will summarize the findings from engagement into a final report outlining community feedback and feasibility. The Project Manager will make recommendations on which use cases should be pursued based on the community feedback solicited in Task 4 as well as the availability of partners and funding. The Project Manager will present preliminary findings to the CAB and VTA.

- **Deliverable:** Slide deck summarizing preliminary report; presentation to CAB and VTA.

### **Task 5: Final Report and Next Steps**

The Project Manager will compile a final report with feedback from City staff, the CAB, VTA and other stakeholders incorporated. The final report will outline which first/last mile connection(s) should be pursued by the City. The final report will include recommendations on location, potential partners, sources of funding and other relevant information for successful rollout.

## SHARED ELECTRIC MOBILITY SERVING COMMUNITIES WITH LOW INCOMES

### Background

Through the EMAP process, an initiative to provide affordable electric shared mobility at an affordable housing site and/or at a key destination in a community with low income was highlighted as a potential project. The following scope maps out a community-driven process, building on an existing pilot of electric shared vehicle and charging facilities at Betty Ann Gardens in San José. This scope seeks to build on the successes and lessons learned from the Betty Ann Gardens project to bring electric shared mobility to one or more additional affordable housing sites in San José.

The Betty Ann Gardens shared electric mobility project is a partnership between Metropolitan Transportation Commission (MTC), Transform and First Community Housing (FCH). The initiative is funded by the California Air Resources Board (CARB) through MTC. Transform is the grant-funded project manager using the grant funds to deliver the project. FCH is the affordable housing developer for Betty Ann Gardens.

The project team conducted an assessment for the mobility needs of residents of Betty Ann Gardens, a 76-unit multifamily affordable housing development. The assessment led to a pilot of electric carshare and chargers at the housing development, as well as coordination with a bikeshare company to provide bikes adjacent to the development. Some of the lessons learned from this pilot include:

- The time-intensive project management needed to deliver the project, in this case provided through the grant funding by Transform
- The advantages of working with a partner that can provide both charging and carshare, rather than having separate providers for these elements
- The need for an ongoing operating subsidy
- The value of having a paid community member onsite to coordinate the program
- The success of a program that draws on the expertise of a resident advisory group
- Building resilience into the project, given the fluid nature of mobility providers (i.e., building a bike room so that residents could also store their own bikes in addition to, or as an alternative to, bikeshare provision)
- The necessity of collecting data about resident's mobility access (such as whether they have a driver's license to use a carshare service or if another mode is more appropriate)

The following project scope maps out an approach that builds on the existing Betty Ann Gardens pilot to expand to one or more additional affordable housing developments.

## Proposed Scope of Work

### Task 1: Project Management

The City of San José will manage relationships with MTC, Transform, potential funders, housing developers, companies, and the community. The City will also consult its Community Advisory Board (CAB) on engagement and program design once it is funded and functioning. The City of San José will designate a Project Manager who will be responsible for managing activities in relation to this project.

### Task 2: Review State of Play and Funding Opportunities

The Project Manager will review current shared electric mobility programs targeting communities with low income in the region, including MTC and TransForm's car sharing and mobility hub project. The review document should list relevant stakeholders, engagement processes, partnership structures, locations, and sources of funding (including funds allocated by the CARB California Climate Investments (CCI) program).

The Project Manager will also evaluate available subsidies and business models that subsidize the use of shared mobility for people with low income. The Project Manager will research how these business models can lead to permanent and/or long-term mobility options for communities. The Project Manager will summarize existing funding opportunities for electric shared mobility and charging infrastructure into a memo that will be shared internally with the DOT grant team for feedback.

- **Deliverable:** Summary of existing shared mobility serving people with low income and funding opportunities (slide deck or document)

### Task 3: Readiness Criteria for Shared Electric Mobility Deployment

The Project Manager will develop evaluation criteria for siting shared electric mobility projects in San José. The evaluation will build upon the KPIs developed in the EMAP.

The Project Manager will develop an infrastructure readiness evaluation, which will include evaluating electrical capacity, available space to install charging, proximity to multimodal options, and ease of contracting mechanism for a variety of shared electric modes of transportation (i.e., one-way and round-trip car share, e-bikes, e-scooters). The Project Manager will also develop a community readiness evaluation, which will include cost of transportation and housing as percent of household income, bike and pedestrian stress levels, number of residents with a driver's license, and mode split, among other potential metrics. Finally, based on the community and infrastructure readiness evaluations, the Project Manager will develop an evaluation framework for discussions with potential partners for this project.

The Project Manager will build these evaluations in consultation with local partners identified in Task 2, including incorporating lessons learned from the MTC- and Transform led pilot.

- **Deliverable:** Evaluation criteria for location siting (spreadsheet and/or concise word document)

#### **Task 4: Location Selection**

The Project Manager will use the location siting criteria from Task 3 to evaluate facilities in housing development and/or City owned property in priority communities. The Project Manager will find up to five sites that meet the key evaluation criteria.

Similarly, the Project Manager will evaluate companies that provide shared electric mobility services utilizing the evaluation framework developed in Task 3. The Project Manager will identify up to four potential companies. The Project Manager will consider funding and partnership structures identified in Task 2 to determine potential partnership structures to deliver on shared electric mobility and charging installations.

In consultation with MTC, Transform and other relevant partners, the Project Manager will also conduct a needs assessment for the existing shared mobility facility at Betty Ann Gardens, including plans to make the program permanent.

The Project Manager will also develop an outreach plan, including an outreach list of relevant community stakeholders. The outreach strategy will specify the communities that will be engaged, the mechanism to compensate community members for their time and expertise, as well as the logistics for outreach (which could include virtual meetings, townhalls, focus groups or other forms of engagement).

- **Deliverable:** Potential project location list and outreach plan (document or slides)

#### **Task 5: Community Engagement**

The Project Manager will create meeting material in keeping with the outreach plan developed in Task 4. Materials could include a slide deck, meeting agenda, and handouts. The CAB will review all outreach materials and provide feedback as possible. The Project Manager will coordinate a series of outreach events on the potential locations for shared electric mobility, working in each community with a trusted community partner. The events will solicit feedback on potential locations, modes, and existing mobility challenges and opportunities. Events could be interviews, community forums with residents or other formats deemed appropriate with local partners.

- **Deliverable:** Workshop notes from community engagement meeting(s)

#### **Task 5: Findings and Recommendations**

The Project Manager will summarize the findings from the previous tasks into a draft memo recommending partnerships providers at priority locations. The memo will outline the next steps to bring the proposed shared mobility concept to fruition, including immediate next steps regarding funding applications. The final memo will be submitted to City Staff with recommendations to move forward on one or more projects.

- **Deliverable:** Final memo (document)

## Implementation Steps

### Recommendation 1

Creating emerging mobility options and programs tailored to seniors and working families with kids. Engage with local neighborhoods, school districts, and universities to educate students on how to safely use emerging mobility services. Tailor to specific age groups.

- Incorporate language in micromobility permit program requiring applicants to demonstrate development of alternative device options and prototypes tailored to seniors and working families.
- Sample Language:
  - **Seattle Free Floating Scooter Share Program**
    - The Vendor shall develop and implement an equity programming plan in accordance with Requirement G10 and Appendix F. Generally, the Vendor's plan shall describe how the Vendor will ensure its services are affordable, accessible, equitably distributed, equitably managed, and engaged with Environmental Justice Communities (described in G2(d)7), **people with disabilities, people experiencing homelessness or housing insecurity, LGBTQ people, women and girls, youth, and seniors.**
      - (b) The Vendor's equity plan shall describe how the Vendor will inform riders and prospective riders in the focus communities about:
        - 1. The concept and basics of device sharing;
        - 2. the Vendor's own service model;
        - **3. the types of devices the Vendor offers for rental;**
        - 4. the pricing policies the Vendor offers under Requirements O4.1 and O4.2; and
        - 5. all rental methods, including the low-barrier rental method the Vendor offers under Requirement O4.3.

### Recommendation 2

Create easy to use options for services that are available and easily understood and used by low-income communities, undocumented people, seniors, persons with disabilities. Options may include pay stations/kiosks, partnerships with local businesses, and card-based payment systems that allow cash filling and can be used across providers.

- Update micromobility permit regulations to require alternative payment options (e.g., cash-based, prepaid cards, PayPal) and permission to use AB-60 drivers licenses.

- Update micromobility permit regulations to require permit applicants to submit a community outreach plan outlining strategies for marketing and expanding low-income discount programs and alternative payment options.

- Sample Language:

- **LA DOT**

Operators seeking to participate in the Dockless Mobility Annual Permit are required to submit an Equity Plan, which includes at a minimum:

- Detailed criteria of plan offered, including a cash option, non-smartphone option, and a low-income plan.
- Plan for low-income customers that include waiving any hold deposits and unlimited free trips under 30 minutes in duration.
- Plan to verify low-income status.

All Operators must have a cash, non-smart phone payment, and reservation option available. All Operators must submit a quarterly report with all outreach conducted to educate customers on these options. Providers must also provide a quarterly report of the usage-rates for each of these options.

LADOT has the right to review and ensure compliance with the submitted Equity Plan. If at any time LADOT deems the Operator not to be in compliance of submitted Equity Plan, LADOT has the right to decrease fleet size or revoke the permit.

- **Pittsburgh**

- Equity

- 1.) Permittee is required to maintain a multilingual website, offering translations in at least Spanish and Mandarin.
- 2.) Permittee will offer a low-income customer plan for City residents that qualify for state, local, or federal governmental assistance programs.
- 3.) Permittee must have easily accessible information about the required process for being approved for the low-income customer plan.
- 4.) Permittee agrees to conduct a marketing campaign at its own cost in Equity Areas to promote the use of E-scooters and to inform users of the available low-income customer plan particularly among low-income residents.

### Recommendation 3

Engage with CBOs to conduct racial equity analyses, and engage with CBOs prior to major program, policy, and project decisions like deployment requirements. work in partnership with community groups to identify evaluation criteria to assess alignment between emerging mobility program and pilots and



community needs. Establish minimum service levels by geography for all services. Evaluate the performance of Emerging Mobility providers in meeting community needs at the midpoint and end of a project or pilot in partnership with CBOs. Make evaluation reports publicly available to community members.

- Identify potential funding sources to develop and compensate members of a community advisory board. Consider onboarding, capacity-building, and materials development costs. Determine whether permit fees from pilot programs can be used.
- Sample Language  
LA DOT – Permit and Permit Fee Structure

<i>Geography</i>	<i>Applicability</i>	<i>Per Trip Fee*</i>
<i>Equity-Focus Mobility Development District</i>	<i>Trips that begin or end in the Equity Focus Mobility Development District</i>	<i>\$0.00/ No Cost</i>
<i>Mobility Development District</i>	<i>Trips that begin or end in a Mobility Development District</i>	<i>\$0.06</i>
<i>Standard Permitted Districts</i>	<i>Trips that begin and end in a Standard Permitted District</i>	<i>\$0.20</i>
<i>Special Operations Zone</i>	<i>Trips that begin or end in Special Operations Zone</i>	<i>\$0.40</i>

*\*The lower per trip fee will apply for trips that begin in one geography and end in another.*

- **Pittsburgh – Scooter Permit**

Permit Fees and Per-Trip Surcharges

A. The Applicant must pay an application fee of \$250.00.

B. The Permittee must pay a Pilot Period Permit Fee of \$5,000.00.

C. The Permittee must pay a Per-Trip Surcharge of \$0.25 for each booked trip.

D. The Director shall provide Per-Trip Surcharge invoices to Permittees monthly. Invoices will be based on trip data provided by the Permittee and verified by PBOT. The invoice payments are due within 30 days of the invoice date. Payments will be considered delinquent if not received within 30 days of invoice date. The Director may suspend or revoke a permit if surcharges are not paid in full.

E. Shared Scooter Fees, surcharges and penalties will be placed in a New Mobility Account and shall be used by PBOT for administration; enforcement; evaluation; safe travel infrastructure; and expanded and affordable access.

F. Fees and surcharges are subject to change by the Director at any time.

## Recommendation 6

Establish workforce development programs to connect low-income residents and youth to emerging mobility-related job opportunities. Establish local hire requirements targeting underserved communities.

- Encourage private mobility providers to attend collegiate and citywide career fairs. Create incentive or requirements for local hiring in permitting language.
  - **San Francisco Powered Scooter Share Program**
    - *Partner-ready programs with established process, dedicated staff, and proper resources, that engage communities in the following areas:*

*Local hiring to facilitate employment of San Francisco and other Bay Area residents for all levels within the permittee's company, with special attention to generate employment opportunities for formerly incarcerated people and immigrant communities, along with internship opportunities for youth and other people entering the work force.*

*Local small business promotional opportunities, that celebrate long-time small business merchants to generate foot-traffic and commercial activity related to active living, transportation, health and recreation.*

## Recommendation 7

Create community benefits programs funded by fees charged to emerging mobility providers. Types of benefits will be informed by the community but may include discounts for CBOs, funding/sponsoring education programs and engagement efforts, funding promotions programs, and investments that support multimodal travel.

- Identify whether such a fee could be included for currently permitted services or amend permitting for future approvals.
- Sample Language
  - LADOT

<i>Geography</i>	<i>Applicability</i>	<i>Per Trip Fee*</i>
<i>Equity-Focus Mobility Development District</i>	<i>Trips that begin or end in the Equity Focus Mobility Development District</i>	<i>\$0.00/ No Cost</i>
<i>Mobility Development District</i>	<i>Trips that begin or end in a Mobility Development District</i>	<i>\$0.06</i>
<i>Standard Permitted Districts</i>	<i>Trips that begin and end in a Standard Permitted District</i>	<i>\$0.20</i>
<i>Special Operations Zone</i>	<i>Trips that begin or end in Special Operations Zone</i>	<i>\$0.40</i>

*\*The lower per trip fee will apply for trips that begin in one geography and end in another.*

## Recommendation 9

Consider requirements or incentives for safety equipment.

- Create list of options for requirements or incentives for safety equipment. Engage with emerging mobility providers to vet/add potential solutions.

- Sample Language

- **San Francisco Powered Scooter Share Program**

During the term of the permit, the Permittee shall offer to its customers not less than one safety training class every quarter. The safety training class must address safe scooter riding rules and inform customers that riding on sidewalks is illegal and may result in account suspension or revocation for the duration of the permit.

- **Portland**

A Permittee must provide a certification to the City that each of the Permittee's Shared Scooters has met all conditions of the City's certification requirements, the Oregon Vehicle Code, and any United States Department of Transportation safety requirements. Shared Scooters not meeting all such conditions will not be allowed to operate.

- The maximum speed of all Shared Scooters must be limited by their Permittees to 15 mph.
- All Permittees shall provide a mechanism for customers to notify the company that there is a safety or maintenance issue with a Shared Scooter.
- All permitted Shared Scooters shall have visible language that provides the following information:
  - 1. A notice to the User that helmets must be worn while riding a Shared Scooter in the City of Portland;
  - 2. A notice to the User that Shared Scooter Users are prohibited from riding on the sidewalk;

- 3. A unique identification number;
- 4. The name of the Permittee; and
- 5. The Permittee's customer service information.