



Transit Talks:

Leveraging State & Federal Funding

February 14, 2024

Hannah Hamilton & Katrina Bayer

CALSTART.org

Agenda

- **HVIP Funding**
 - Overview
 - ****New**** Transit Flexibilities
- **FTA Low No**
 - Overview
 - FY24 Call for Projects
- **Q & A**

February 2024



 **CALIFORNIA**
HVIP
Voucher Incentive Project

Hannah Hamilton



About HVIP

The California Air Resources Board (CARB), in partnership with CALSTART, launched the **Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP)** in 2009 to accelerate the adoption of cleaner, more-efficient trucks and buses.

Vouchers apply directly to dealers at time of purchase!

12,000+

Clean-Tech
Vehicles Funded

1,700+

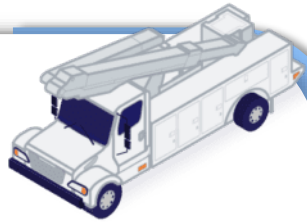
Fleets Participating

60%

In pollution-burdened
communities



HVIP Eligible Vehicles



ePTO



Heavy-Duty Bus



Medium-Duty Bus



Refuse



School Bus



Step and Panel
Van



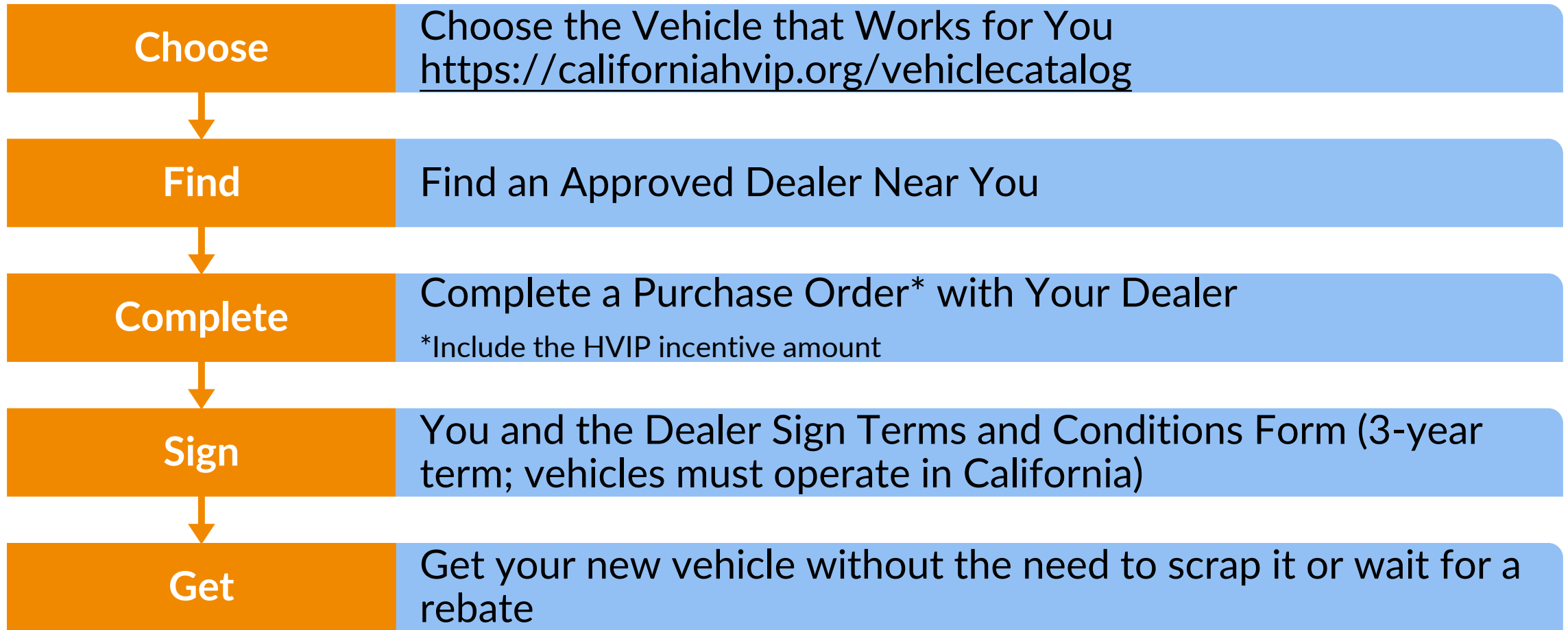
Straight Truck



Tractor

Search at
CaliforniaHVIP.org

How Purchasers Participate in Standard HVIP



Currently Available HVIP Funds

Funding Category	Total Available Funds*
Standard HVIP	\$190M
Public Transit Bus Set-Aside	\$84M
Public School Bus Set-Aside	Closed
Drayage Truck Set-Aside	\$132M
Innovative Small E-Fleets Set-Aside	\$19M

*As of 2/13/2024



Funding Tables

Voucher Modifiers	Amount
Public Transit Agencies	+15%
Disadvantaged Community*	+15%
Class 8 Fuel Cell	+100%

*Only fleets with <20 vehicles are eligible for the 15% Disadvantaged Community modifier.

Public fleets with <20 vehicles are eligible for a **doubled** (100% increase) **base incentive amount**.

Vehicle Weight Class	Base Incentive Amount
Class 3	\$45,000
Class 4-5	\$60,000
Class 6-7	\$85,000
Class 8	\$120,000

HVIP Policy Updates

- HVIP is currently open to accept voucher requests for Standard HVIP funding and the Public Transit Bus Set-Aside.
 - No anticipated end date.
- Purchase Orders for new voucher requests must be dated **March 30, 2023** or later.
- Purchaser voucher cap increase to 50 vouchers for transit buses
- Voucher amounts are modified according to the number of vehicles in a fleet, starting Jan. 1, 2023.
 - Public Fleets: Voucher amounts are not modified unless the fleet size is 20 or fewer vehicles (100% increase).

Check out CaliforniaHVIP.org/Funding for the latest information and updates!



HVIP Transit Flexibilities

HVIP offers additional flexibilities for transit buses operated by or on behalf of a city or county government; a transportation district / transit district, including paratransit and microtransit services.

36-month Redemption Timeline:

Transit agencies have 36 months rather than 18 months to redeem their vouchers.

Letter of Intent:

Permitted for transit agencies in lieu of a purchase order. The LOI may be dated no earlier than 1/1/2024. A purchase order is required within 6 months of submission.

15% Voucher Modifier:

The 15% voucher modifier continues to apply to bus vouchers for transit agencies.

HVIP + FTA Low No

- HVIP is now eligible to be used for local match in federal Bus Competitive Program funds, such as FTA's Low and No Emission Vehicle Program.
- The Process:

LOI is submitted on the voucher request in place of a purchase order.

Once the voucher request progresses to the status "Funds Reserved", an auto email goes to the dealer and purchaser.

*This email serves as HVIP's match commitment.

Apply for Low No (or other) funds.

Purchase order is required within 6 months of voucher request submission

- CARB offers Support Letters for FTA Low No and Bus & Bus Facilities applications upon request.



Transit Dealer/OEM Flexibility

- To enable a faster redemption process for HVIP approved dealers, a **Delivery Document** may be submitted in lieu of a **Bill of Lading** and in advance of final payment.
- HVIP vouchers associated with contracts in which there is retainage are ineligible for early redemption.
- Sample documents and details available at www.CaliforniaHVIP.org/TransitBus



Online Resources

CALIFORNIA HVIP

Funding Vehicles **Purchasers** Sellers Impact & Data News

How to Participate

Get in on base vehicle price breaks from \$20,000 to \$240,000, depending on the vehicle you purchase. Whether you operate one vehicle or hundreds, HVIP dealers are ready to work with you. Individual owner-operators, small businesses, corporate leaders, school districts, and municipal fleets are all eligible. Select a funding type below.

[But first, infrastructure!](#) [Funding Updates](#) [FAQs](#)
[FY22-23 Updates](#)

Select Funding Type: Public Transit Bus

01 Public Transit Bus Set-Aside

The Public Transit Set-Aside is for transit buses operated by or on behalf of a city or county government; a transportation district/transit district; or a public agency, including paratransit and microtransit services.

[Eligible Heavy-Duty Buses](#) [Eligible Medium-Duty Buses](#)

02 FY22-23 Set-Aside Updates

Effective 4/3/2023, a Letter of Intent may be submitted with a voucher request in place of a Purchase Order for purchasers who are transit agencies. Transit vouchers will also receive an extended redemption timeline of 36 months.

The details of this update is contingent upon the FY22-23 Implementation Manual (IM) and subject to change until the IM's publication.

03 Letter of Intent

A Letter of Intent (LOI) is permitted for transit purchase order at the point of voucher request 4/3/2023. The date of signature on the LOI must be January 1, 2023. A purchase order (or other bid) required within 6 months of submission, otherwise requests will be cancelled.

Purchase orders must be dated March 30, 2023.

[Sample Transit LOI](#)

www.CaliforniaHVIP.org/TransitBus

Online Tools



Funding Finder Tool

Navigating MHD vehicles & infrastructure funding opportunities across CA.
(fundingfindertool.org)



Voucher Map and Data!

Follow the funds with monthly updates about how HVIP is impacting YOUR community.
(californiahvip.org/impact)



Truck, School Bus, & Transit Infrastructure Planning Tools

Free resources to help deploy clean vehicles into your operations.
(californiahvip.org/purchasers)

For more information visit our website

www.californiahvip.org or

email us at info@californiahvip.org

EXTENDED - Partial Tax Exemption for Zero-Emission Technology Transit Buses

- The partial sales and use tax exemption for eligible purchases and leases of hybrid and zero-emission technology buses by qualified purchasers was scheduled to expire on December 31, 2023, and has been extended through **December 31, 2025.**
- Vehicles eligible for the partial sales and use tax exemption must also be HVIP eligible vehicles. The partial tax exemption applies whether or not HVIP funding was used to purchase or lease the transit bus.



Federal Funding Highlight

**Low or No Emission Grants Program (Low No) -5339 (c)
Grants for Buses and Bus Facilities Program – 5339 (b)**

Katrina Bayer

Intro

- **Low or No Emission (Low No):** provides funding to state and local governmental authorities for the purchase or lease of zero-emission and low-emission transit buses as well as acquisition, construction, and leasing of required supporting facilities
- **Bus and Bus Facilities:** provides funding to replace, rehabilitate and purchase buses and related equipment and to construct bus-related facilities

FTA Review Process

Intake

Technical Evaluation

Additional Considerations

Review and Selection

Evaluation Criteria

Criteria Generally Include:

- Demonstration of Need & Benefits
- Planning and Local or Regional Prioritization
- Local Financial Commitment (Local Match)
- Project Implementation Strategy
- Technical, Legal, and Financial Capacity



FY 23: Unprecedented Funding Meets Unprecedented Demand

$\Delta \approx \$7 \text{ billion}$



475 Eligible Applications

FY 23: LowNo and Bus & Bus Facilities

475 Eligible Applications

342 "Highly Recommended"

130 Funded

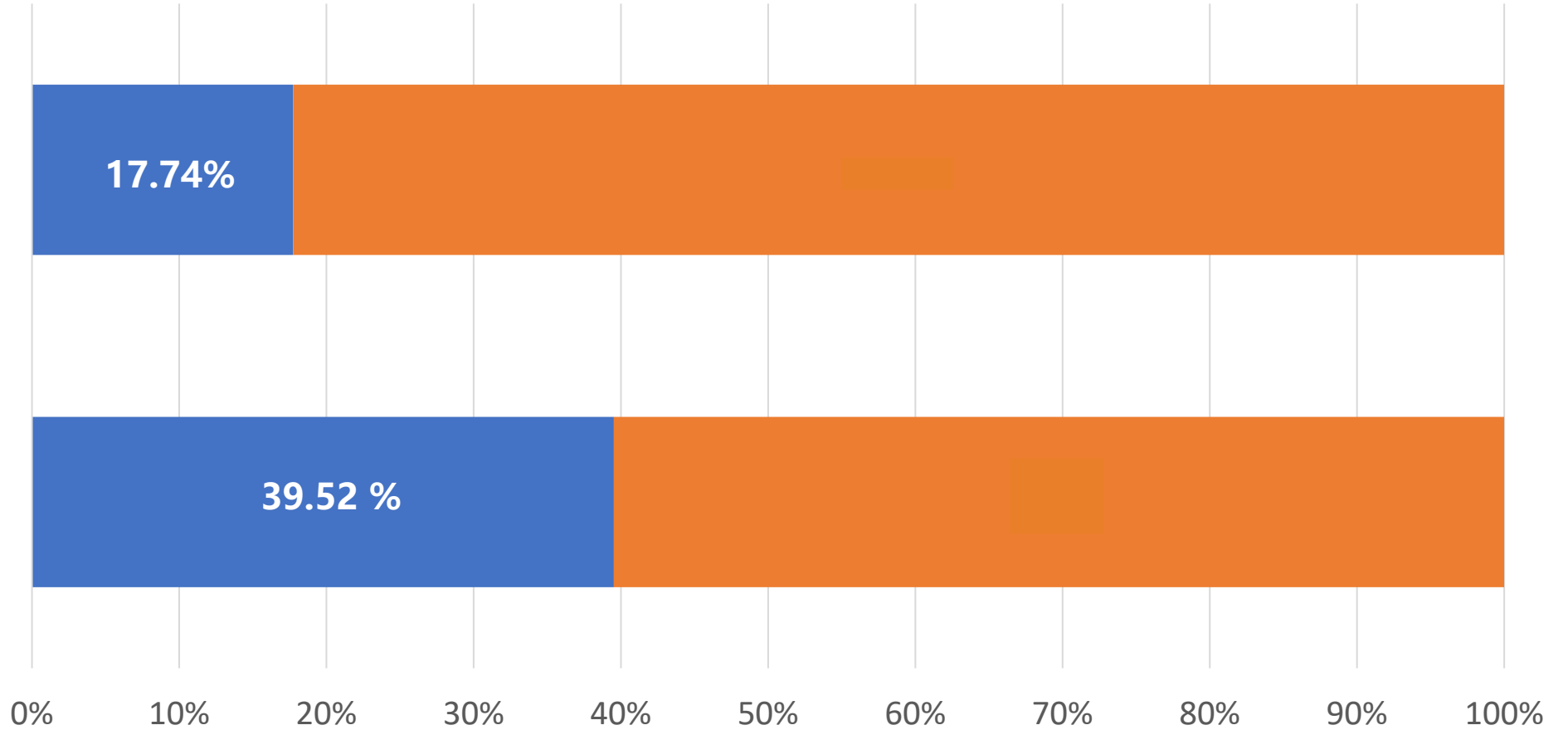
FY 23

Bus & Bus Facility

17.74%

LowNo

39.52 %

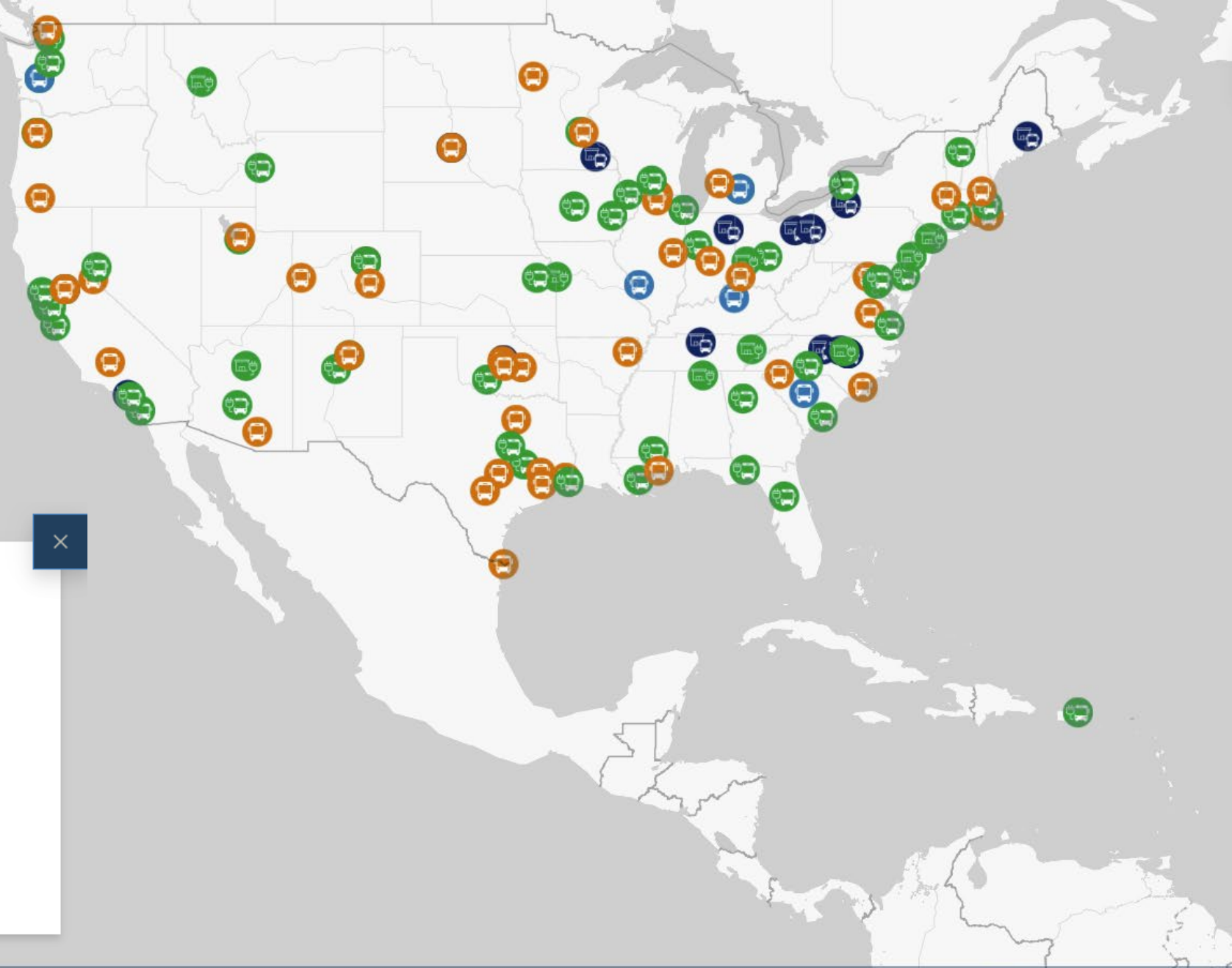


	LowNo	Bus & Bus Facility
■ Funded	83	47
■ Not Funded	127	218

≈ 4.2 Billion

≈ 4.5 Billion

FY 23



FY2023 All Bus Grant Awards

-  Zero Emission Bus Project
-  Low Emission Bus Project
-  Conventional Bus Project
-  Conventional or Low Emission Facility Project
-  Zero Emission Facility Project

FY24 NOFO



Federal Register / Vol. 89, No. 27 / Thursday, February 8, 2024 / Notices

8741

of conductors under 49 CFR part 242. See 49 CFR 240.101; 49 CFR 242.101.

2. Submit to FRA for approval a list of conductors and engineers who have been certified under the written programs approved by FRA, with complete, written certification determinations for each individual as required under 49 CFR 240.109 for engineers, and 49 CFR 242.109 for conductors.

3. Submit to FRA for approval a written program of operational tests and inspections to be put in effect in accordance with 49 CFR 217.9.

4. Submit to FRA for approval a training program in compliance with 49 CFR part 243 for training, qualification, and oversight of safety-related railroad employees.

5. Submit to FRA for approval an on-track safety program that complies with the requirements of 49 CFR part 214, subpart C, and complete training and qualification records in accordance with that program for all employees who will engage in any on-track work or use of roadway maintenance machines.

6. Submit to FRA a list of designated, qualified persons responsible for maintenance and inspection of track in accordance with 49 CFR 213.7.

7. Accompany FRA track inspectors on a joint inspection of all BNGR track.

8. Complete all remedial actions noted by FRA for track defects identified following the joint inspection and submit records of all required track inspections after the completion of all remedial action.

9. Certify to FRA that a self-audit of HOS records has been completed and submit to FRA any records found to be incorrect or substantially incomplete with corrections to those records, to the

to Christian.Holt@dot.gov and subsequently inform the FRA Administrator in writing that it believes all of the requirements of this Order have been met. FRA will conduct verification inspections and will inform BNGR in writing whether it is in compliance with this Order so that the Order may be lifted. If FRA does not lift the Order, FRA's written response will specifically describe what additional measures need to be taken to meet all of the requirements of this Order.

Partial Relief

For FRA to consider granting partial relief from this Order, BNGR must submit a written plan for approval to Christian.Holt@dot.gov that provides a detailed explanation of the partial relief sought, the specific measures that BNGR proposes to ensure the safety of any operations to be permitted, and the period of time for which such partial relief is sought.

Any partial relief provided will remain subject to BNGR's compliance with its approved written plan to provide safety measures, limitations on operations, and time periods for each component part of the partial relief. Failure to comply with any material provision of the approved plan will result in the partial relief being revoked.

Penalties

Any violation of this Order or the terms of any approved written plan pursuant to this Order subjects the person (railroad carrier) committing the violation to a civil penalty of up to \$35,516 for ordinary violations and \$142,063 for aggravated violations for each day the violation continues. 49 U.S.C. 21301; 88 FR 89551 (Dec. 28,

to operations of all trains, locomotives, and any other on-track rail vehicles or equipment. Notice of this Order will be provided by publishing it in the **Federal Register**. Copies of this Order will be sent by email prior to publication to BNGR, ODOT, and BIA.

Review

Opportunity for formal review of this Order will be provided in accordance with 49 U.S.C. 20104(b) and 5 U.S.C. 554. Administrative procedures governing such review are found at 49 CFR part 211. See 49 CFR 211.47, 211.71, 211.73, 211.75, and 211.77.

Issued in Washington, DC, on February 2, 2024.

Amitabha Bose,
Administrator.

[FR Doc. 2024-02536 Filed 2-7-24; 8:45 am]

BILLING CODE 4910-06-P

DEPARTMENT OF TRANSPORTATION

Federal Transit Administration

FY 2024 Competitive Funding Opportunity: Low or No Emission Grant Program and the Grants for Buses and Bus Facilities Competitive Program

AGENCY: Federal Transit Administration (FTA), Department of Transportation (DOT).

ACTION: Notice of funding opportunity (NOFO).

SUMMARY: The Federal Transit Administration (FTA) announces the opportunity to apply for approximately \$1.10 billion in competitive grants under the fiscal year (FY) 2024 Low or No Emission Grant Program (Low-No

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ACTION: Notice of funding opportunity (NOFO).

SUMMARY: The Federal Transit Administration (FTA) announces the opportunity to apply for approximately \$1.10 billion in competitive grants under the fiscal year (FY) 2024 Low or No Emission Grant Program (Low-No Program) (Federal Assistance Listing: 20.526) and approximately \$390 million in competitive grants under the FY 2024 Grants for Buses and Bus Facilities Program (Buses and Bus Facilities Program) (Federal Assistance Listing 20.526), subject to availability of appropriated funding.

DATES: Complete proposals must be submitted electronically through the [GRANTS.GOV](https://www.grants.gov) "APPLY" function by 11:59 p.m. eastern time on April 25, 2024. Prospective applicants should initiate the process by registering on the [GRANTS.GOV](https://www.grants.gov) website promptly to ensure completion of the application process before the submission deadline.

FY24 NOFO Highlights

- Issued: February 8, 2024: [2024-02246.pdf \(govinfo.gov\)](#)
- **\$1.1 Billion in LowNo**
- **\$390 Million in Bus & Bus Facilities**
- Deadline: Midnight EDT **April 25, 2024**
- Register in [Grants.gov](#) **now** to ensure timely submission

New in FY24

Priority Consideration will be given to Applicants:

- Reducing Vehicle Customization:
 - Joint Procurement: ≥ 3 Agencies w/ Common Specs
 - Standard Vehicle Model
- Earlier Payments to Vehicle Manufacturers:
 - Advanced Payments
 - Progress Payments

FY24 NOFO

Additional Considerations:

- **Fleet Transition Plans required** for Zero Emission Projects
- **Workforce Development** in any Zero Emission Project
 - 5% of your total ask should be assigned to Workforce Dev
 - *These amounts are a plus-up NOT a take down*
- **Partnership Provision** applies to Low No OR both programs.

OEMs

Vendors

Project Consultants

CALSTART is ready to assist

CALSTART is your perfect partner.

Is your FY24 Low-No Proposal:

- A consolidated proposal with several transits?
- Focused on Zero-Emission vehicles (Battery-Electric or Fuel Cell Electric)?
- Supporting your at-scale deployment plans?

We will share our expertise, work to deliver the greatest results, and be your partner throughout the process.

CALSTART brings over 30 years of experience
Providing a range of technical services to support your project from inception to implementation

- Fleet Vehicle Electrification Planning
- Infrastructure Planning
- Vehicle Acquisition Assistance
- Charging Strategy Development
- Route Modeling and Analysis

We built the tools



SELECT CALSTART IN-HOUSE DECISION-SUPPORT TOOLKIT OFFERINGS

Zero-Emission Technology Inventory Tool (ZETI): Offers an interactive look at up-to-date offerings from manufacturers of zero-emission vehicles across class 2b-8 over the next few years.

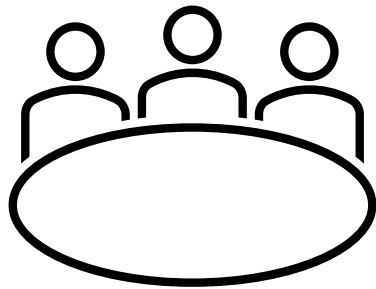
Emissions Modeling Tool: Calculates and projects GHG, energy, and other savings based on a combination of shifting modes and switching to zero-emission technologies.

Total Cost of Ownership (TCO) Tool: Provides graphics and charts for easy understanding of the total cost and benefit of zero-emission vehicles. Provides analytic and cost elements for the project with ongoing results to allow for successful implementation and outcomes.

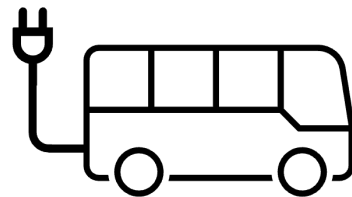
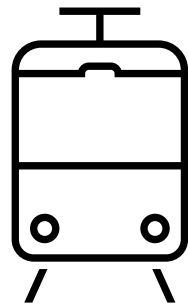
Route Energy Modeling (REM): Provides overlay of a variety of different bus makes and sizes on a specific corridor, accounting for topography, climate, passenger load, charging station design, and hours of operations, among other factors. Models performance of transit vehicles, accounting for challenging cold climate and hot weather conditions, to understand the likelihood of the buses meeting operational hours and ranges. Informs charging infrastructure strategies.

Choosing to Apply

Questions to Ask Yourself Before Applying



1, 2, 3



General Considerations for FY24

Low No and Bus & Bus Facilities Grants are highly competitive

Ensure your application addresses the Administration's priorities

- Community Benefits
- Emissions Reductions
- Workforce Development
- Reduced Customization
- Collaboration with Workforce
- Support Justice40

Tell Your Story!

- 1 FTA receives applications from all 50 States and U.S. Territories (500+ in the Bus/Low-No Program alone).
- 2 Members of technical review teams may not be from or familiar with your state, county, city, or town—so tell your story.
- 3 **The NOFO is the “test”— use it as a guide for responding. If it is being asked, it is likely important!**

Stand Apart!

Remember, these are competitive programs!

- Every Project Has Value – what is the value of **yours**?
- **Differentiate Your Application**
 - Supporting evidence
 - Firsthand accounts
 - Pictures

Please note – Reviewers read up to 50 applications for a single program.
Be concise, format logically, and only provide information relevant to your project.

Attention to Detail – Avoid These Pitfalls

1

Failure to address key criteria listed in the NOFO

- If it is mentioned, the application should address it, even so much as to say not applicable

2

Inconsistencies in the budget

- Federal requested amount differs between SF-424 and Supplemental Form
- Match in budget does not match amount listed in match section
- Match includes items that are not eligible (not allowable or already incurred costs)

3

Project timeline is not plausible or supported

- Project completion dates or milestones are not realistic based upon the type of project
- Timeline only includes one milestone

4

Lack of information on key planning or environmental requirements

- Applicant does not address whether the project is in the TIP/STIP or can be added
- Applicant does not mention NEPA status, level of effort needed, or projected completion timeline

Key Takeaways

- **Common Mission: FTA & Transits** – if you have a question, ask, and ask early.
- **Understand** the statute and **follow** what is listed and requested in the NOFO.
- **Attention to detail** – errors and inconsistencies severely hinder applications.
- Tell your story/**set yourself apart** – these are extremely competitive programs.
- Be **comprehensive** and **effective** in your application but also **concise**.
- **Use resources** – webinars, FTA website, industry groups, etc.

Region 9

Areas served: Arizona, California, Hawaii, Nevada, American Samoa, Guam, and the Commonwealth of the Northern Mariana Islands.

Region 9 Office

Federal Transit Administration
San Francisco Federal Building
90 7TH ST STE 15-300
SAN FRANCISCO CA 94103-6701
415-734-9490

Los Angeles Office

Federal Transit Administration
888 S FIGUEROA ST STE 440
LOS ANGELES CA 90017-5311
213-202-3950

Other Sources of Local Match

EnerglIZE – Transit Set Aside Funding Lane FY24 (March 27 – September 26)



www.EnerglIZE.org



- LCTOP
- TIRCP

- Carl Moyer
- VW BMP

← Now Stackable



CALIFORNIA ENERGY COMMISSION



Recap HVIP Transit Flexibilities

HVIP = Local Match

Sample Letter of Intent for Voucher Request Submission

[Transit Agency Letterhead]

[Date]

[Manufacturer Point of Contact]

[Title]

[Name of Manufacturing Company/Dealership]

[Address]

Dear [Manufacturer Point of Contact],

The [Transit Agency] plans to utilize the Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project (HVIP) in conjunction with [Funding Source A] and [Funding Source B, if applicable] to purchase *three (3)* [Bus Make/Model] from [Manufacturing Company/Dealership].

Contingent on award of funds from [Funding Source A], this Letter of Intent establishes commitment of [Transit Agency] to purchase *three (3)* [Bus Make/Model] with supporting funds from HVIP vouchers. This is a non-binding agreement to finalize a contract with [Manufacturing Company/Dealership] by [Qx 202x] and take delivery of the buses by [Qx 202x] if the aforementioned [Funding Source A] funds are awarded.

[Transit Agency Point of Contact Signature]

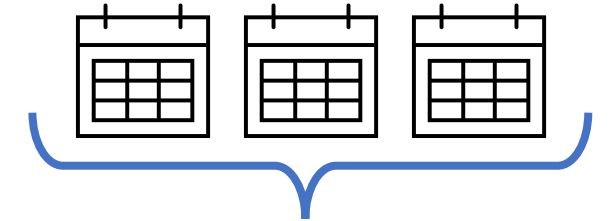
[Transit Agency Point of Contact Print Name]

[Transit Agency Point of Contact Title]

[Transit Agency Point of Contact Phone Number]

[Transit Agency Point of Contact Email Address]

If the bus order is not dependent on award announcements from other funding sources, please state any order contingencies.



36-month timeline

+15% for Public Transit Service

Heavy-Duty Bus - Hybrid and Zero-Emission Truck and Bus Voucher Incentive Project | California HVIP

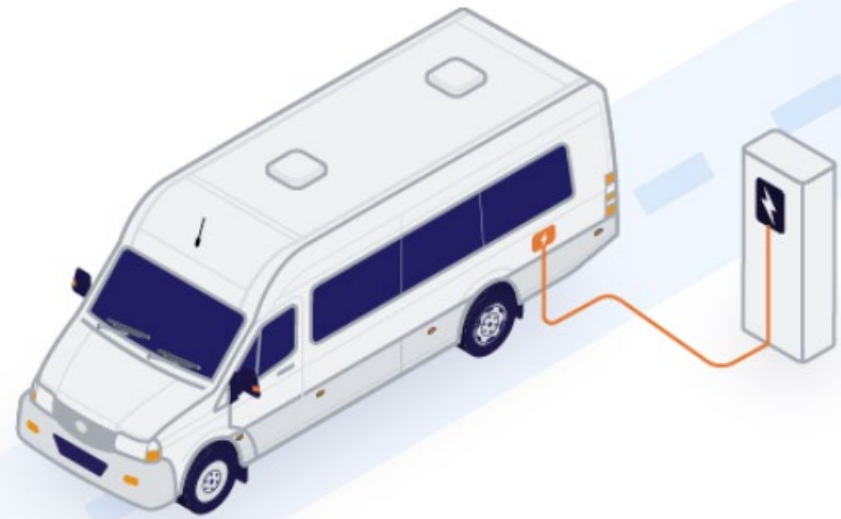




HVIP Transit Bus



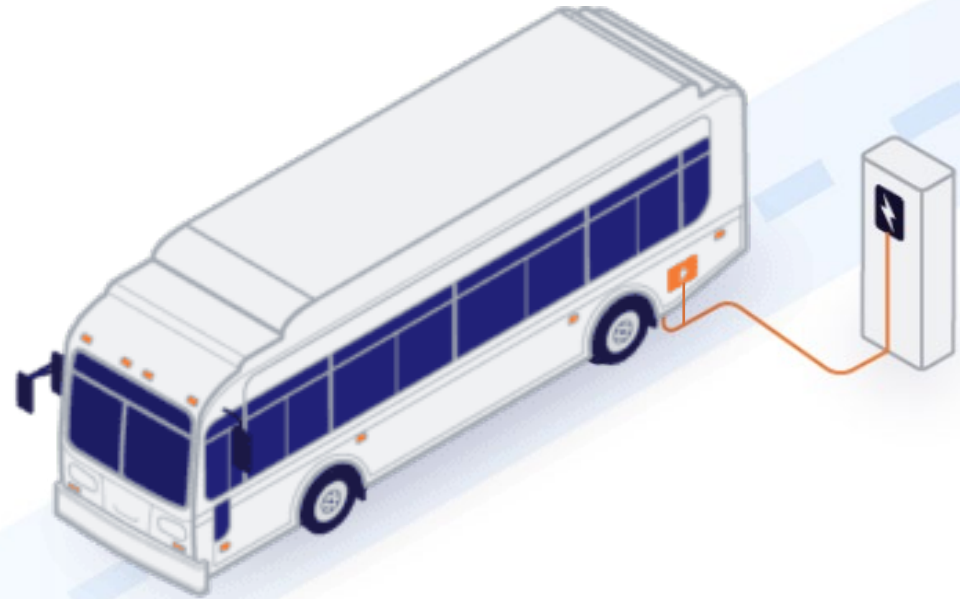
HVIP Shuttle Bus



\$30K

\$85K

HVIP Transit Bus



\$60K

\$240K

Need help getting started? Have questions?

HVIP:

Hannah Hamilton

Hhamilton@calstart.org

Email for a [Sample Letter of Intent](#)
[Appendix H: HVIP Public Transit Set Aside](#)

LowNo & Grants:

Katrina Bayer

Kbayer@calstart.org

Email for FY24 NOFO Highlights
CALSTART Grant Support Fact Sheet