Grant Modernization Task Force Meeting #3

February 16, 2022

Agenda

01. Welcome and Updates

Welcome from project team, updates on consolidated application progress, training, other items

02. Demonstration: DRAFT Application

Panther staff will demonstrate the creation of a BlackCat project and review the budget spreadsheet

03. Training Insights

Capture feedback from task force members on what to include in training and instructions

04. Task Force Impact Overview

Review feedback we've received from the Task Force and how it will be incorporated into the process

05. Next Steps

Review major dates for consolidated application, Re-Finalize Charter, look ahead to 2022-2023

Consolidated Application Demonstration by BlackCat

Feedback and Insights

Insights for Training and Instructions

Questions

- What potential issues do you see with the application as currently designed?
  - Budget spreadsheet
  - Upload files

- How would you describe this process to other users to ensure that it is easy to understand?
  - New users
  - Existing users

- Are there any major flaws you think need to be addressed sooner rather than later?

Review of Task Force Work to Date

Task Force Meeting Summary

- Meeting 1: January 12
  - Established Task Force Goals and Charter
  - Shared background of the Grant Modernization effort
  - Collected feedback, suggestions and questions on the process

- Meeting 2: January 26
  - Update on status of the consolidated application
  - Demo of the BlackCat application
  - Preview of upload files and budget spreadsheets

Task Force Feedback

- Collected detailed feedback on the current process as well as suggestions for what an improved process might look like

- Many suggested changes are already being incorporated into the consolidated application (Phase I)

- Additional improvements will continue to be made in future phases of the Grant Modernization effort

Incorporating Feedback

Phase 1: Consolidated Application – March 1, 2022

- Consolidating applications for 5311/5311(f), 5339, LCTOP, and SGR programs

- Reducing the number of upload files required improving the formatting and organization of upload files

- Reducing requests for redundant Organizational Information

- Increased opportunities for training and support

Phase 2: Improved Grant System – 2022-2023

- Improved user-friendly grant system

- Including additional programs in the consolidated application (5310 and TIRCP)

- 2-year call for projects cycle

- Consistent annual schedule

- Consolidated reporting

- Improving alerts and notifications within the grants management system

- Cross validation checks of program eligibility requirements

- Budget accelerator to account for price increase

- Quicker payment turnaround

Key Dates

Included Programs

- 5311/5311(f) – FTA Rural Transit & Intercity Bus/CMAQ

- 5339 – FTA Bus and Bus Facilities

- LCTOP – Low Carbon Transit Operations Program

Attend a training with DRMT and BlackCat

- DRMT and BlackCat staff will be hosting three training sessions in early March (follow up email and website update forthcoming)

- Sessions will be organized into Northern, Central, and Southern CA regions
  - Targeting week of March 7

- If you cannot attend the training for your region, you are welcome to attend any of the three sessions

- DRMT will also be hosting a Q&A as a follow-up to the training sessions
  - Targeting week of March 14

Grant Modernization Task Force

Summary of Key Dates

- **March 1:** Consolidated Application opens (5311/5311(f), 5339, LCTOP)

- **March 2:** 5310 Application Deadline

- **Friday, March 25:** LCTOP Spreadsheet Deadline

- **Friday, April 29:** Consolidated Application Deadline

Grant Modernization Task Force

Finalize Charter

Task Force Charter

- The purpose of the stakeholders group is to provide meaningful input into the DRMT overall process re-engineering effort. The group will be consulted throughout the process at key milestone points to gather input on products, processes and other proposed changes.

- The team will meet on an as needed basis. Members will participate with ideas and feedback, treat each other with respect, listen to each other and work effectively as a team.

- The Stakeholders Team will work with DRMT on each phase of work to achieve positive outcomes that provide benefits for transit grantees, DRMT staff, Caltrans and other executives, legislators as well as the public.
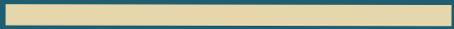
Thank you

Questions? Comments?

grant.modernization@dot.ca.gov

Archive

5310 is not included

- 5310 is not included in the consolidated application for this year's application cycle.

- The deadline for the 5310 program is still March 2, 2022

- It will be incorporated into the consolidated application in the next application cycle

The LCTOP Spreadsheet is due Friday March 25

- If you are only applying for LCTOP, your application is due Friday March 25, 2022

- If you are applying for federal funds, your LCTOP spreadsheet still needs to be completed in BlackCat by Friday, March 25, 2022

- This will allow DRMT to start working on LCTOP applications and get payments out in a more timely manner

Task Force Membership

Task Force (Organizations Invited)

- Amador Transit
- Amma Transit Planning
- Angel View
- CALACT
- California Transit Association
- City of Chowchilla
- Culver City
- Eastern Sierra Transit Authority
- El Dorado Transit
- Fresno County Rural Transit Agency
- Golden Empire Transit District
- Kings Area Rural Transit
- Lassen Transit Service Agency
- Mariposa County Transportation Planning
- Merced Transit Authority

- Mobility Matters
- Monterey-Salinas Transit
- Morongo Basin Transit Authority
- Move Stanislaus
- Napa Valley Transportation Authority
- Orange County Transit Authority
- Plumas County Transportation Commission
- Riverside County Transportation Commission
- Sacramento Regional Transit
- SamTrans
- San Joaquin Regional Transit District
- San Luis Obispo Regional Transit Authority
- Santa Barbara County Association of Governments
- Santa Barbara Metropolitan Transit District
- Santa Rosa

- Tahoe Transportation District
- Thousand Oaks
- Tri Delta Transit
- Tuolumne County Transportation Commission
- Victor Valley Transit Authority
- Yuba-Sutter Transit

Survey Responses

Survey Responses

General feedback on the existing grant application process has been solicited through a survey that was shared via email and on the Caltrans website.

- 20 Responses received from agencies representing all current programs

- 91% of respondents listed the application to be the most challenging part of the current process

- 86% would like to see a consistent annual schedule

- Overall, respondents are supportive and enthusiastic about the prospect of a consolidated application, believe it would streamline the process of accessing funds administered by Caltrans, and reduce staff hours spent completing the applications

- Most respondents believe that moving to a 2-year cycle on a regular schedule would be a positive change, but would require more time (at least 3 months) to prepare for the application

Survey Responses Continued...

Feedback on Current Process:

- Too many upload documents, poor formatting, unclear instructions on what is required, requests for duplicative information, and confusing forms were all cited as specific areas for improvement

- The application timeline is also a problem area: Inconsistent schedules year over year, changes to the application from one application cycle to the next, and long waits to receive payment were problems for the majority of respondents

Survey Responses Continued...

What respondents would like to see in an improved process:

- One set of questions and uploads to apply for multiple or all grants at once

- Clear instructions, example documents, ample training opportunities, less redundant, better formatted upload docs

- A consistent annual schedule with more time to prepare and complete their applications (at least 3 months)

- Shorter turnaround for payment

- A timeline that aligns with other key funding dates (such as SCO apportionment announcements, FTIP planning cycles)