



AMBAG Board of Directors Agenda

Association of Monterey Bay Area Governments

P.O. Box 2453, Seaside, California 93955-2453

Phone: (831) 883-3750

Fax: (831) 883-3755

Email: info@ambag.org

DATE: October 14, 2026

Time: 6:00 PM

LOCATION: Monterey Bay Air Resources District, Board Room, 3rd Floor

24580 Silver Cloud Court

Monterey, CA 93940

To participate virtually, use the following link:

Para participar de forma virtual, utilice el siguiente enlace:

<https://us06web.zoom.us/j/88434234218?pwd=8bCgV571K0nvV4EixH13X1SHT9U6yn.1>

Or Telephone: US: +1 669 900 6833

Webinar ID: 884 3423 4218

Passcode: 739828

Members of the public who wish to address the AMBAG Board of Directors on an item to be considered at this meeting, can do so in person, virtually, or via email. Written public comment can be submitted at info@ambag.org or by emailing the Clerk of the Board at aflores@ambag.org. The subject line should read "Public Comment for the October 14, 2026 Board of Directors Meeting." Written comments will be distributed to the AMBAG Board of Directors prior to the meeting.

Miembros del publico que desean dirigirse a la mesa directiva de AMBAG con respecto a cualquier asunto en esta agenda, pueden hacerlo en persona, de forma virtual o por correo electrónico. Los comentarios públicos por escrito pueden enviarse a info@ambag.org o al correo electrónico de la Secretaria, aflores@ambag.org. El asunto del correo electrónico debe indicar: "Comentario público para la reunión de la mesa directiva del 14 de octubre de 2026". Los comentarios por escrito se distribuirán a los miembros de la mesa directiva de AMBAG antes de la reunión.

AMBAG Board Member(s) Meeting Remotely:

Manu Koenig: 5200 Soquel Avenue, Santa Cruz, CA 95062

831-234-3922

1. CALL TO ORDER

2. PLEDGE OF ALLEGIANCE

3. JUST CAUSE ATTENDANCE

Recommended Action: INFORMATION

- Maura Twomey, Executive Director

Receive oral report.

4. ROLL CALL

**5. ORAL COMMUNICATIONS FROM THE PUBLIC ON ITEMS NOT ON THE AGENDA
(A maximum of two minutes on any subject not on the agenda)**

6. ORAL COMMUNICATIONS FROM THE BOARD ON ITEMS NOT ON THE AGENDA

7. APPOINTMENT OF NOMINATION COMMITTEE

Recommended Action: APPOINT

- President McCarthy

Appoint a Nominating Committee to propose a Slate of Officers for 2027.

8. COMMITTEE REPORTS

A. Executive/Finance Committee

Recommended Action: INFORMATION

- President McCarthy

Receive oral report.

B. Monterey Bay National Marine Sanctuary Advisory Council Meeting

Recommended Action: DIRECT

- President McCarthy

Receive a report from Director McCarthy on the September 18, 2026 MBNMS Advisory Council meeting. The next meeting is scheduled on November 20, 2026.

9. EXECUTIVE DIRECTOR'S REPORT

Recommended Action: INFORMATION

- Maura Twomey, Executive Director

Receive a report from Maura Twomey, Executive Director.

10. **CONSENT AGENDA**

Recommended Action: APPROVE

Note: Actions listed for each item represents staff recommendation. The Board of Directors may, at its discretion, take any action on the items listed in the consent agenda.

A. Draft Minutes of the September 9, 2026 AMBAG Board of Directors Meeting

- Ana Flores, Clerk of the Board

Approve the draft minutes of the September 9, 2026 AMBAG Board of Directors meeting. (Page 7)

B. AMBAG Regional Clearinghouse Monthly Newsletter

- Regina Valentine, Senior Planner

Accept the clearinghouse monthly newsletter. (Page 13)

C. Draft 2027 Calendar of Meetings

- Ana Flores, Clerk of the Board

Approve the draft 2027 Calendar of Meetings. (Page 21)

D. Amendment No. 9 to the Employment Agreement between AMBAG and Maura F. Twomey

- President McCarthy

Approve the Amendment No. 9 to the Employment Agreement between AMBAG and Maura F. Twomey. (Page 23)

E. Revised Administrative Policies

- Diane Eidam, Retired Annuitant

Adopt the Administrative Policies. (Page 27)

F. Revised Procurement Policy and Procedures Manual

- Diane Eidam, Retired Annuitant

Adopt the Procurement Policy and Procedures Manual. (Page 65)

G. Authorized Check Signers for RCPWG Bank Account

- Jessica Agee, Director of Finance & Administration

Approve the individuals with check signing authority for the Monterey Bay Area Regional Climate Project Working Group (RCPWG) bank accounts. (Page 67)

H. Financial Update Report

- Jessica Agee, Director of Finance & Administration

Accept the financial update report which provides an update on AMBAG's current financial position and accompanying financial statements. (Page 71)

11. ITEMS REMOVED FROM CONSENT CALENDAR FOR DISCUSSION AND POSSIBLE ACTION

12. PROGRAMS

A. Monterey Bay Electric Vehicle Climate Adaptation and Resiliency Framework Draft Roadmap

Recommended Action: INFORMATION

- Amaury Berteaud, Director of Sustainability Programs

Receive a presentation on the Monterey Bay Electric Vehicle Climate Adaptation and Resiliency Framework Draft Roadmap. (Page 77)

B. Update on the Central California Rural Regional Energy Network

Recommended Action: INFORMATION

- Amaury Berteaud, Director of Sustainability Programs

Receive a presentation on the Central California Rural Regional Energy Network. (Page 129)

13. ADJOURNMENT

Reference Items:

- A. 2026 Calendar of Meetings (Page 133)
- B. Acronym Guide (Page 135)

Next Meeting:

Date: November 18, 2026

Location: MBARD Board Room, 24580 Silver Cloud Court, Monterey, CA 93940

Executive/Finance Committee Meeting: 5:15 PM

Board of Directors Meeting: 6:00 PM

If requested, the agenda or materials shall be made available in appropriate alternative formats to persons with a disability, as required by Section 202 of the Americans with Disabilities Act of 1990 (42 USC Sec. 12132), and the federal rules and regulations adopted in implementation thereof. If you have a request for disability-related modification or accommodation, including auxiliary aids or services, contact Ana Flores, AMBAG, 831-883-3750, or email aflores@ambag.org at least 48 hours prior to the meeting date. Pursuant to Government Code Section 54952.7, please find Chapter 9, also known as the Ralph M. Brown Act using the following link:

https://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?division=2.&chapter=9.&part=1.&lawCode=GOV&title=5

Si se solicita, la agenda y materiales estarán disponibles en formatos alternativos apropiados para personas con discapacidad, requerido por Sección 202 de la Ley de Estadounidenses con Discapacidades de 1990 (42 USC, Sec. 12132) y las normas y reglamentos federales adoptados para su implementación. Si necesita alguna modificación o adaptación relacionada con una discapacidad, incluyendo ayudas o servicios auxiliares, comuníquese con Ana Flores, AMBAG, al 831-883-3750 o envíe un correo electrónico a aflores@ambag.org con al menos 48 horas de anticipación a la fecha de la reunión de la junta directiva. De conformidad con la Sección 54952.7 del Código de Gobierno, por favor consulte el Capítulo 9, también conocido como la Ley Ralph M. Brown.

https://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?division=2.&chapter=9.&part=1.&lawCode=GOV&title=5

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**DRAFT MINUTES OF THE PROCEEDINGS
OF THE BOARD OF DIRECTORS OF THE
ASSOCIATION OF MONTEREY BAY AREA GOVERNMENTS**

September 9, 2026

1. CALL TO ORDER

The Board of Directors of the Association of Monterey Bay Area Governments, President McCarthy presiding, convened at 6:08 p.m. September 9, 2026 at the MBARD Board Room, 24580 Silver Cloud Court, Monterey, CA 93940.

2. PLEDGE OF ALLEGIANCE

3. JUST CAUSE ATTENDANCE

None.

4. ROLL CALL

<u>AMBAG Board of Directors</u>			
PRESENT:			
Agency	Representative	Agency	Representative
Del Rey Oaks	John Uy	County of San Benito	Mindy Sotelo
Gonzales	Scott Funk	County of Santa Cruz	Felipe Hernandez (6:20)
Marina	Brian McCarthy		
Monterey	Jean Rasch	<u>Ex-Officio Members:</u>	
Pacific Grove	Cynthia Garfield	3CE	Inaara Muhammad
Salinas	Margaret D'Arrigo	Caltrans, District 5	Leila Boroumand
San Juan Bautista	Jose Aranda	MBARD	David Frisbey
Sand City	Marilee Diaz	MPAD	Mary Ann Leffel
Santa Cruz	Scott Newsome	MST	Lisa Rheinheimer
Scotts Valley	Greg Wimp	TAMC	Mike Zeller
Seaside	Alex Miller		
Soledad	Ben Caldera		
Watsonville	Eduardo Montesino (6:16)		
ABSENT:			
Capitola	Susan Westman	<u>Ex-Officio Members:</u>	
Carmel-by-the-Sea	Hans Buder	SBtCOG	Binu Abraham
Greenfield	Rachel Ortiz	SCCRTC	Sarah Christensen
Hollister	Rudy Picha	SC Metro	Corey Aldridge
King City	Oscar Avalos		
County of Monterey	Glenn Church		
County of Monterey	Kate Daniels		
County of San Benito	Angela Curro		
County of Santa Cruz	Manu Koenig		

Others Present: Michael Miller; Emiko White, County of Santa Cruz; Amaury Berteaud, Director of Sustainability Programs; Bhupendra Patel, Director of Modeling; Regina Valentine, Senior Planner; Will Condon, Senior Planner; Chris Duymich, Senior Planner; Gina Schmidt, GIS Coordinator; Elizabeth

Lippa, Administrative Assistant; Ana Flores, Clerk of the Board; and Maura Twomey, Executive Director.

5. ORAL COMMUNICATIONS FROM THE PUBLIC ON ITEMS NOT ON THE AGENDA

None.

6. ORAL COMMUNICATIONS FROM THE BOARD ON ITEMS NOT ON THE AGENDA

None.

7. COMMITTEE REPORTS

A. Executive/Finance Committee

President McCarthy reported that the Executive/Finance Committee approved the consent agenda that included 1) Minutes of the August 12, 2026 meeting 2) list of warrants as of June 30, 2026; and 3) accounts receivable as of June 30, 2026. The Executive/Finance Committee also received a report on the financials from Maura Twomey, Executive Director.

B. Monterey Bay National Marine Sanctuary (MBNMS) Advisory Council (SAC) Meeting

President McCarthy reported that the next MBNMS will be celebrating its 34th birthday at their September 18, 2026 meeting. The SAC will also receive updates on the Tankers Reef and the San Francisco SAC summit. The SAC will also be voting on the maritime industry seat.

8. EXECUTIVE DIRECTOR'S REPORT

Maura Twomey, Executive Director announced that AMBAG was awarded a California Air Resources Board Community Planning and Capacity Building grant. The Ride Forward Community eBike Lending Library Feasibility and Planning Project, is one of 16 projects selected for funding out of 84 applicants. AMBAG will be partnering with Ecology Action to explore creating eBike lending libraries and how these libraries can be integrated with Mobility Hub, and how they can help create workforce development paths for eBike technicians in our region.

Director Montesino arrived.

9. CONSENT AGENDA

A. Draft Minutes of the August 12, 2026 AMBAG Board of Directors Meeting

The draft minutes of the August 12, 2026 AMBAG Board of Directors meeting were approved.

B. AMBAG Regional Clearinghouse Monthly Newsletter

The AMBAG Clearinghouse monthly newsletter was accepted.

C. AMBAG Sustainability Program Update

The Sustainability Program update was accepted.

D. Information Technology Support Services Contract

The Information Technology Support Services contract with Jaso Technology was approved. The Executive Director was authorized to negotiate and execute the agreement for an amount not to exceed \$335,000.

E. Draft FY 2026-27 Monterey Bay Region Overall Work Program (OWP) and Budget Amendment No. 2

The Draft FY 2026-27 OWP and Budget Amendment No. 2 was approved.

F. Revised Employee Handbook and Personnel Policies

The revised Employee Handbook and Personnel Policies were approved.

G. Financial Update Report

The financial update report was accepted.

Motion made by Director Newsome, seconded by Director Funk to approve the consent agenda. Motion passed unanimously.

10. ITEMS REMOVED FROM CONSENT CALENDAR FOR DISCUSSION AND POSSIBLE ACTION

None.

Director Hernandez arrived.

11. PLANNING

A. Draft Monterey Bay Metropolitan Transportation Improvement Program (MTIP): FFY 2026-27 to 2029-30

Will Condon, Associate Planner gave a presentation on the Draft MTIP FFY 2026-27 to 2029-30. The MTIP is a short range transportation improvement program that covers four years, is updated every two years, and amended as needed. The MTIP is a requirement by federal and state law to receive federal and state funds. The MTIP is developed by AMBAG in consultation with the RTPAs, transit agencies, Caltrans, FHWA and FTA, local agencies/project sponsors, and transportation stakeholders and the public. The total investment to the region is \$1.52 billion for a total of 103 projects. It breaks down by county to the following: 1) \$641,663 for Santa Cruz County, \$662,186 for Monterey County, and \$219,877 for San Benito County. The MTIP funding by source is 1) Federal funding \$227,038; 2) Local funding is \$590,095; and 3) State funding is \$706,593. The MTIP public participation process included 1) 30 day-public review and comment period from July 31, 2026 to August 31, 2026; 2) a public hearing was held on August 12, 2026 at the AMBAG Board of Directors meeting; 3) website posting to the AMBAG, RTPAs and transit agency websites; and 4) public notices were published in

the local newspapers on July 31, 2026. The next steps include 1) State approval on November 13, 2026; and 2) Federal approval on December 16, 2026. Brief discussion followed.

Motion made by Director Hernandez, seconded by Director Montesino to approve the Monterey Bay Metropolitan Transportation Improvement Program (MTIP): FFY 2026-27 to 2029-30. Motion passed unanimously.

12. CLOSED SESSION

As permitted by Government Code Section 54956 et seq. of the State of California, the Board of Directors may adjourn to Closed Session to consider specific matters.

A. EVALUATION OF PERFORMANCE

Government Code Section 54957 - Title: Executive Director

13. RECONVENE FROM CLOSED SESSION

President McCarthy stated that there is nothing to report.

14. ADJOURNMENT

The Board of Directors meeting adjourned at 6:51 PM.

Brian McCarthy, President

Maura F. Twomey, Executive Director

DRAFT AMBAG BOARD OF DIRECTORS MEETING ATTENDANCE & VOTING RECORD
BOARD MEETING DATE: September 9, 2026

Attendance (X= Present; AB= Absent) Voting (Y= Yes; N=No; A=Abstain)				
MEMBER	AMBAG REP	Attendance	Item 9	Item 11
Capitola	Susan Westman	AB	n/a	n/a
Carmel-by-the-Sea	Hans Buder	AB	n/a	n/a
Del Rey Oaks	John Uy	X	Y	Y
Gonzales	Scott Funk	X	Y	Y
Greenfield	Rachel Ortiz	AB	n/a	n/a
Hollister	Rudy Picha	AB	n/a	n/a
King City	Oscar Avalos	AB	n/a	n/a
Marina	Brian McCarthy	X	Y	Y
Monterey	Jean Rasch	X	Y	Y
Pacific Grove	Cynthia Garfield	X	Y	Y
Salinas	Margaret D'Arrigo	X	Y	Y
San Juan Bautista	Jose Aranda	X	Y	Y
Sand City	Marilee Diaz	X	Y	Y
Santa Cruz	Scott Newsome	X	Y	Y
Scotts Valley	Greg Wimp	X	Y	Y
Seaside	Alex Miller	X	Y	Y
Soledad	Ben Caldera	X	Y	Y
Watsonville	Eduardo Montesino	X (6:16)	Y	Y
County Monterey	Kate Daniels	AB	n/a	n/a
County Monterey	Glenn Church	AB	n/a	n/a
County Santa Cruz	Manu Koenig	AB	n/a	n/a
County Santa Cruz	Felipe Hernandez	X (6:20)	*	Y
County San Benito	Mindy Sotelo	X	Y	Y
County San Benito	Angela Curro	AB	n/a	n/a

(* = Board Member(s) arrived late or left early, therefore, did not vote on the item. Please refer the minutes)

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MEMORANDUM

TO: AMBAG Board of Directors

FROM: Maura F. Twomey, Executive Director

RECOMMENDED BY: Regina Valentine, Senior Planner

SUBJECT: AMBAG Regional Clearinghouse Monthly Newsletter

MEETING DATE: October 14, 2026

RECOMMENDATION:

It is recommended that the Board of Directors accept the September 2026 Clearinghouse monthly newsletter.

BACKGROUND/DISCUSSION:

Since March 12, 1984, under adopted State Clearinghouse Procedures, the Association of Monterey Bay Area Governments (AMBAG) was designated the regional agency responsible for clearinghouse operations in Monterey, San Benito, and Santa Cruz Counties. These procedures implement Presidential Executive Order 12372 as interpreted by the "State of California Procedures for Intergovernmental Review of Federal Financial Assistance and Direct Development Activities." They also implement the California Environmental Quality Act of 1970 as interpreted by CEQA Guidelines.

The purpose of the Clearinghouse is to provide all interested parties within the Counties of Monterey, San Benito, and Santa Cruz notification of projects for federal financial assistance, direct federal development activities, local plans and development projects, and state plans that are proposed within the region. These areawide procedures are intended to be coordinated with procedures adopted by the State of California.

FINANCIAL IMPACT:

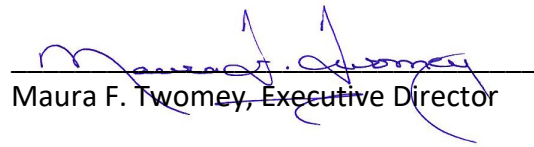
There is no direct financial impact. Staff time for monitoring clearinghouse activities is incorporated into the current AMBAG Overall Work Program and budget.

COORDINATION:

Notices for the Clearinghouse are sent by lead agencies to AMBAG. Interested parties are sent email notifications twice a month with the newsletter attached.

ATTACHMENT:

1. Monthly Newsletter - Clearinghouse items September 1 – 30, 2026.

APPROVED BY:

Maura F. Twomey, Executive Director

Attachment 1

AMBAG REGIONAL CLEARINGHOUSE

The AMBAG Board of Directors will review these items on 10/14/26

Association of Monterey Bay Area Governments PO Box 2453 Seaside CA 93955 | 831.883.3750

ENVIRONMENTAL DOCUMENTS

20260903

Watsonville General Plan 2050

City of Watsonville

Justin Meek

(831) 768-3050

Draft Environmental Impact Report* (DEIR)

The Watsonville General Plan 2050 is a comprehensive update of the Watsonville 2005 General Plan to guide land use, mobility, housing, conservation, safety, public facilities, and other policy decisions through 2050. General Plan 2050 establishes a long-term community vision and planning framework for public and private development while responding to changed conditions and new State requirements including AB 1358 (Complete Streets), SB 99 (Evacuation Analysis), SB 379 (Climate Adaptation), SB 932 (Safe Systems), SB 1241 (Wildfire Hazards), and SB 1000 (Environmental Justice).

General Plan 2050 focuses growth within Downtown Watsonville, along the Freedom Boulevard and East Lake Avenue corridors, and in identified new growth areas. It introduces a broader range of housing choices; supports new employment, commercial, regional retail, visitor-serving, and community recreation uses; preserves natural open space and agricultural resources; improves parks and community facilities; implements complete streets improvements; and supports rerouting truck traffic around the City. The plan would also update the City's land use map, goals, policies, and implementation actions and would serve as a first-tier program-level planning document for future development.

The full buildout projections for General Plan 2050 facilitate up to 5,980 new residential units and approximately 2.672 million square feet of nonresidential development. This includes approximately 4,560 residential units within the existing City limits; 1,420 residential units in the Area A (Buena Vista), Area B (Atkinson Lane) and/or Area C growth areas; 513,000 square feet of nonresidential development within the existing City limits; 2.129 million square feet of nonresidential development in the Highway 1 Gateway growth area; and 30,000 square feet of neighborhood-serving retail in the Buena Vista and Area C growth areas. More information available at <https://experience.arcgis.com/experience/6423c33848d24c1f94c7c6d717b8c94d/page/Draft-EIR-Document>

Project Location:

Santa Cruz County

Watsonville

Parcel: N/A

Public hearing information:

City Council Chambers, 275 Main Street, Top Floor, Watsonville, CA and Zoom

2/23/2027

4:30 PM

Public review period ends

Thursday, November 5, 2026

City of Santa Cruz

Rina Zhou

(831) 420-5104

Draft Environmental Impact Report* (DEIR)

Demolition of an existing single-family dwelling unit and reconstruction of a single-family dwelling unit of similar size and within same footprint and removal of two heritage-sized trees on a parcel located within the Santa Cruz Downtown Historic District.

Project Location:

Santa Cruz County

Santa Cruz

Parcel: 00650211

Public hearing information:

To be determined, more information available at

<https://www.santacruzca.gov/Government/City-Departments/Community-Development/Current-Planning/Environmental-ReviewCEQA>

Public review period ends **Friday, October 16, 2026**

PUBLIC HEARINGS

20260904

Early Notice and Public Review of a Proposed Activity in a Wetland

California Housing Finance Agency

Madina Castro

(877) 922-5432

Other

The Anton Solana Apartments project proposes new construction of an affordable multifamily residential community on a vacant 6.26-acre property. The project site is currently undeveloped land, with the exception of a small shed that will be demolished to construct five buildings ranging from three to five stories. The mixed-use project will incorporate approximately 1,800 square feet of neighborhood serving commercial space along with 173 rental housing units.

The proposed project retains an existing onsite stream channel, riparian woodland, oak woodland and wet meadow habitat. A walking path is proposed adjacent to the east edge of the riparian corridor and would provide connections to Winkle Park located to the east of the project site. The path will be open to the public. The area of disturbance adjacent to the riparian area is approximately 3,300 square feet. The project includes demolition, reconstruction and trenching work required to provide utilities to the site and to upgrade any required facilities that may be in the public right-of-way, including curb, gutter and sidewalk as needed.

Project Location:

Santa Cruz County

Live Oak

Parcel: 02535119000

Public hearing information:

More information can be found at <https://www.calhfa.ca.gov/about/press/public-notice/20260825-Early-Notice-Anton-Solana-Apts.pdf>

Public review period ends **Sunday, October 18, 2026**

Monterey County

Craig Spencer
(831) 755-5233

Draft Environmental Impact Report* (DEIR)

The project is a standard subdivision resulting in the creation of 29 parcels that would include 26 residential parcels (ranging from 1.4 acres to 3.7 acres) and three separate open space areas (totaling 73.2 acres). The project requires a Combined Development Permit, which would include the following:

1. Standard Subdivision Vesting Tentative Map for the division of a 130.8-acre parcel,
2. Use Permit for development on slopes over 30 percent, and
3. Use Permit to allow the removal of 215 coast live oak trees for the construction of roads and future development of residences on the project site.

Future development of residential lots would require additional permits, such as grading and building permits. The 1982 General Plan applies to this project as the project application was deemed complete in 2007, prior to the adoption of the 2010 Monterey County General Plan. More information can be found at <https://www.countyofmonterey.gov/government/departments-a-h/housing-community-development/planning-services/current-planning/general-info/current-major-projects>

Project Location:

Monterey County
Prunedale

Parcel: 125051012000

Public hearing information:

Public hearing time/date to be determined.

Public review period ends **Monday, November 2, 2026**

**California State University Monterey Bay Stadium
Expanded Use Project**

California State University, Monterey Bay (CSUMB)

Erin Harwayne

(831) 373-4341

Final Environmental Impact Report

The CSUMB Stadium Expanded Use Project proposes an expansion of existing programming at the CSUMB Stadium by CSUMB and the Monterey Bay Football Club (MBFC) and the construction and operation of two (2) new locker room facilities, two (2) new restroom buildings, and a gated event staging area just north of the stadium. The underlying purpose of the proposed project is to modernize and enhance the existing stadium to function as a flexible, multipurpose venue that better supports CSUMB's academic and athletic programs while accommodating expanded use, including partnerships with external organizations such as professional athletic entities (e.g., United Soccer League).

The CSU Board of Trustees will be considering the project and Final EIR for approval at their board meeting on September 22-23, 2026. The Final EIR and associated documents can be found at <https://csumb.edu/departments/facilities/planning/>.

Project Location:

Monterey County

Seaside

Parcel: 031101044000

Public hearing information:

The California State University Board of Trustees, agenda posted

<https://www.calstate.edu/csu-system/board-of-trustees>

9/22/2026 10:00 AM

Public review period ends **Wednesday, September 23, 2026**

Generated: 10/1/2026 10:17:07 By: Regina Valentine, Senior Planner

More detailed information on these projects is available by calling the contact person for each project or through AMBAG at (831) 883-3750. Comments will be considered by the AMBAG Board of Directors in its review. All comments will be forwarded to the applicants for response and inclusion in the project application. If substantial coordination or conflict issues arise, the Clearinghouse can arrange meetings between concerned agencies and applicants.

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Draft 2027 AMBAG Calendar of Meetings

January 13, 2027	MBARD Board Room 24580 Silver Cloud Court, Monterey, CA 93940 Meeting Time: 6 pm
February 10, 2027	MBARD Board Room 24580 Silver Cloud Court, Monterey, CA 93940 Meeting Time: 6 pm
March 10, 2027	MBARD Board Room 24580 Silver Cloud Court, Monterey, CA 93940 Meeting Time: 6 pm
April 14, 2027	MBARD Board Room 24580 Silver Cloud Court, Monterey, CA 93940 Meeting Time: 6 pm
May 12, 2027	MBARD Board Room 24580 Silver Cloud Court, Monterey, CA 93940 Meeting Time: 6 pm
June 9, 2027	MBARD Board Room 24580 Silver Cloud Court, Monterey, CA 93940 Meeting Time: 6 pm
July 2027	No Meeting Scheduled
August 11, 2027	MBARD Board Room 24580 Silver Cloud Court, Monterey, CA 93940 Meeting Time: 6 pm
September 8, 2027	MBARD Board Room 24580 Silver Cloud Court, Monterey, CA 93940 Meeting Time: 6 pm

October 13, 2027	MBARD Board Room 24580 Silver Cloud Court, Monterey, CA 93940 Meeting Time: 6 pm
November 10, 2027	MBARD Board Room 24580 Silver Cloud Court, Monterey, CA 93940 Meeting Time: 6 pm
December 2027	No Meeting Scheduled



MEMORANDUM

TO: AMBAG Board of Directors

FROM: Brian McCarthy, President

SUBJECT: Amendment No. 9 to the Employment Agreement
between AMBAG and Maura F. Twomey

MEETING DATE: October 14, 2026

RECOMMENDATION:

1. Approve Amendment No. 9 to the Employment Agreement between AMBAG and Maura F. Twomey.
2. Approve a one time Employee Performance Retention Fund in the amount of \$4,500 to be distributed at the discretion of the Executive Director by December 31, 2026.

BACKGROUND/ DISCUSSION:

The AMBAG President Brian McCarthy met with the Executive Director Maura Twomey and negotiated an Amendment to her Employment Agreement on September 9, 2026. Amendment No. 9 contains the following changes to the Employment Agreement:

- Increases the annual salary from \$220,692 to \$227,313 based on a 3% Cost of Living Adjustment.
- Adds one year to the agreement, extending the term to August 19, 2028.

In addition to the above noted changes to the Employment Agreement, the Board President negotiated the following terms with the Executive Director:

- AMBAG will fund a one time Employee Performance Retention Fund in the amount of \$4,500 to be distributed at the discretion of the Executive Director by December 31, 2026.
- The Executive Director will present her 2027 Goals to the Board of Directors at the January 2027 AMBAG Meeting.

ATTACHMENT:

1. Amendment No. 9 to the Employment Agreement between AMBAG and Maura F. Twomey.

APPROVED BY:

A handwritten signature in dark ink, appearing to read 'B. McCarthy', is written over a horizontal line.

Brian McCarthy, President

Attachment 1

EMPLOYMENT AGREEMENT BETWEEN
THE ASSOCIATION OF MONTEREY BAY AREA GOVERNMENTS
AND MAURA F. TWOMEY

AMENDMENT NO. 9

This AMENDMENT NO. 9 (Amendment) to the EMPLOYMENT AGREEMENT (Agreement) dated November 8, 2017 is between the ASSOCIATION OF MONTEREY BAY AREA GOVERNMENTS (AMBAG) and MAURA F. TWOMEY (TWOMEY) and is dated October 14, 2026.

In accordance with Section 6.2 of the Agreement, the AMBAG Board of Directors performed an evaluation of TWOMEY for the period of August 20, 2025 to August 19, 2026. Based on this evaluation, AMBAG and TWOMEY agree to the Amendment with the following revisions to the terms of the Agreement:

A. Section 4.1, Compensation, is amended to read:

As full and total compensation for the performance of those Services set forth herein, AMBAG shall pay TWOMEY a salary of \$227,313/year, effective July 1, 2026, in equal semimonthly installments through the regular AMBAG payroll procedure.

B. Section 6.1 is amended to read:

Term. This agreement shall be for a period of eleven (11) years commencing August 20, 2017 and ending August 19, 2028, unless terminated by either party in accordance with the provisions set forth in Article 6.3 of this Agreement, or until terminated by death or permanent disability of TWOMEY. If AMBAG terminates the employment of TWOMEY without cause under Article 2 of this Agreement TWOMEY is entitled to severance benefits equal to six (6) months of her then current salary. AMBAG shall also provide a payout equivalent to a period not to exceed six (6) months following such termination for the continuation of TWOMEY's health benefits, life insurance and long-term disability insurance. If this Agreement is terminated as a matter of law by the death of TWOMEY, the heirs of TWOMEY are not entitled to any future compensation or benefits that TWOMEY may have earned had the agreement not been terminated by death.

IN WITNESS WHEREOF, the PARTIES have executed this Amendment on the day and year written below.

DATED: _____
MAURA F. TWOMEY

DATED: _____
AMBAG

BY: _____
Brian McCarthy
AMBAG President

Approved as to form:

DATED: _____
AMBAG Counsel



MEMORANDUM

TO: AMBAG Board of Directors

FROM: Maura F. Twomey, Executive Director

SUBJECT: Revised Administrative Policies

MEETING DATE: October 14, 2026

RECOMMENDATION:

Adopt the Revised Administrative Policies.

BACKGROUND/DISCUSSION:

The draft Administrative Policies are attached for Board action at this meeting. The draft Administrative Policies were updated to reflect changes in required state and federal regulations.

FINANCIAL IMPACT:

None.

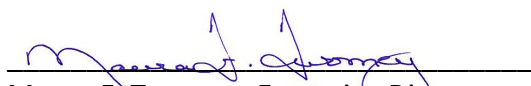
COORDINATION:

None.

ATTACHMENTS:

1. Summary of 2026 Updates to 2012 Administrative Policies
2. AMBAG's Draft Administrative Policies

APPROVED BY:


Maura F. Twomey, Executive Director

Attachment 1

AMBAG

Administrative Policies

Summary of 2026 Updates to Policies Originally Adopted June 9, 2009

Number	Title	Disposition
1	Official Travel	Updated and incorporated in Employee Handbook approved by the Board on 9/9/26
2	Procurement Policies	Updated and incorporated in Procurement Policies and Procedures Manual adopted by the Board on 10/8/14.
3	Credit Cards	Revised
4	Monitoring Pass-Through Funds	Updated and incorporated in Sub-Recipient Manual approved by the Board on 9/26/18
5	AMBAG Logo Shirts	Deleted - no longer relevant
6	Media Contact	Deleted - no longer relevant
7	Disposition of Surplus Property	Revised
8	Electronic Communication	Updated and incorporated in Employee Handbook approved by the Board on 9/9/26
9	Exit Interview	Updated and incorporated Employee Handbook approved by the Board on 9/9/26
10	Paper Reduction	Deleted – no longer relevant
11	Records Retention	Revised
12	Recruiting, Screening and Hiring for Staff Positions	Updated and incorporated in Employee Handbook approved by the Board on 9/9/26
13	Relocation Expenses	Updated and incorporated in Employee Handbook approved by the Board on 9/9/26
14	Reporting of Workplace Injury	Updated and incorporated in Employee Handbook approved by the Board on 9/9/26

15	Staff Development and Succession Plan	Updated and incorporated in Employee Handbook approved by the Board on 9/9/26
16	Telecommuting /Work-at-Home	Updated and incorporated in Employee Handbook approved by the Board on 9/9/26
17	Local Technical Assistance Guidelines	Revised
18	Charging of Costs to Federal Awards	Updated and incorporated in Sub-Recipient Manual approved by the Board on 9/26/18
19	Accounting for Local Match	Updated and incorporated in Sub-Recipient Manual approved by the Board on 9/26/18.

Attachment 2

**ASSOCIATION OF MONTEREY BAY AREA
GOVERNMENTS
ADMINISTRATIVE POLICIES**

OCTOBER 2026

Adopted: June 9, 2009
Amended: October 14, 2026

AMBAG
Administrative Policies
Table of Contents

1. Conflict of Interest Code
2. Credit Cards
3. Disposition of Surplus Property
4. Generative Artificial Intelligence Tools
5. Local Technical Assistance Guidelines
6. Public Records Requests
7. Records Management
8. Records Retention Schedule 2026
9. Rules of Decorum - Legislative Body Meetings
10. Technical Disruption of Remote Participation – Board Meetings

AMBAG ADMINSTRATIVE POLICY No. 1

CONFLICT OF INTEREST CODE

The Political Reform Act, Government Code Sections 81000, et. Seq., requires AMBAG to adopt and promulgate a Conflict of Interest Code. The Fair Political Practices Commission has adopted a regulation, 2 California Code of Regulations, Section 18730, which contains the terms of a standard model Conflict of Interest Code, which can be incorporated by reference, and which may be amended by the Fair Political Practices Commission to conform to the requirements in the Political Reform Act after public notice and hearings. Therefore, the terms of 2 California Code of Regulations, Section 18730 and any amendments to it duly adopted by the Fair Political Practices Commission alone with the attached Appendices in which officials, consultants and employees are designated and disclosure categories are set forth, are hereby incorporated by reference and constitute the Conflict of Interest Code for AMBAG.

Persons holding positions listed in the Appendix are designated employees, consultants, or officials. It has been determined that these persons make or participate in the making of decisions that may foreseeably have a material effect on financial interests. Designated persons shall file statements of economic interest with the AMBAG when assuming or leaving their position and annually while holding the position. AMBAG will make statements available for public inspection and reproduction (Government Code Section 81008). Statements for all designated employees will be retained by the AMBAG and provided to the regional Code Reviewing Body.

Appendix A

Table 1

Designated Position	Disclosure Categories (See Appendix B)

Pursuant to California Code of Regulations, Section 18701, AMBAG consultants who pursuant to a contract with the AMBAG, perform the same functions that would otherwise be performed by the persons designated in Table 1 of this document; who manage public investments; who grant agency approval to a contract or to the specifications for such a contract; or who decide whether the policies, standards, or guidelines for AMBAG have been met, are also required to fill out and submit a disclosure of financial interests. Those consultants are required to report in accordance with the disclosure categories shown in Table 2.

Consultants will be designated and informed of their obligation to file disclosures whenever any person who, in the opinion of the AMBAG, may reasonably be expected to make, participate in making, or in any way attempt to use his/her as a “consultant” to influence a governmental decision in which the person might reasonably be expected to have a financial interest.

Table 2

Type of Consultant	Designated Position Title	Disclosure Categories (See Appendix B)

Public Officials Who Manage Public Investments

The following positions are also listed below because the individuals holding these positions must file under Government Code Section 87200 as they are involved in the investment of public funds.

Table 3

Public Official Description

Appendix B

When a designated person is required to disclose investment and sources of income, he or she needs to disclose investments in business entities and sources of income that do business in the AMBAG's jurisdiction, plan to do business in the jurisdiction, or have done business in the jurisdiction in the past two years. In addition to other activities, a business entity is doing business within the jurisdiction if it owns real property within the jurisdiction. Persons designated in Appendix A shall disclose their financial interests pursuant to the appropriate disclosure categories described in the table below.

Table 4

Disclosure Category	Description
1	Interests in real property located within the jurisdiction or within two miles of the boundaries of the jurisdiction or within two miles of any land owned or used by the AMBAG.
2	Investments and business positions in business entities, and income, including loans, gifts* and travel payments, from sources that provide services, supplies, materials, machinery, or equipment of the type utilized by the AMBAG.
3	Investments and business positions in business entities, and income, including loans, gifts* and travel payments, from sources that provide services, supplies, materials, machinery, or equipment of the type utilized by the department or division to which the filer is assigned duties.
4	Investments and business positions in business entities, and income, including loans, gifts* and travel payments, from sources that have filed a claim against the AMBAG in the previous two years, or have a claim pending.

*Gifts with a value of less than \$50 aggregate per year are not reportable financial interests at the AMBAG.

AMBAG ADMINISTRATIVE POLICY No. 2

CREDIT CARDS

1. The existing administrative policies on purchasing and travel apply to all credit card usage. The use of the credit cards must be in accord with the administrative policies and procedures.
2. A credit card may be issued to Executive Director to use for AMBAG related travel and other work-related expenditures. A second credit card may be held by the Director of Finance and Administration for purchase of food, supplies, equipment and travel/room/facility reservations and deposits.
3. The AMBAG credit card may be used to purchase food for committee meetings, office supplies and equipment.
4. All users of the AMBAG credit card must turn in receipts to the Staff Accountant for all purchases, with supporting documentation for the purpose of the purchase such as meeting agendas.
5. The credit card statements are included with the monthly report to the Board of Directors on AMBAG check payments.
6. Relating to travel: AMBAG credit cards shall be used in accordance with the AMBAG travel policies and IRS reimbursement limits unless there are mitigating circumstances such as no hotels or restaurants available at the IRS rates and conferences being held at a given hotel, or meetings held at a given restaurant.
7. Limit on expenses: all purchases shall be made in accordance with AMBAG purchasing policies in Purchasing of Goods.
8. Office/food purchases shall be reserved for official AMBAG functions and committee meetings, with the exception of purchase of food during travel or out-of-office meetings.
9. Employee shall reimburse AMBAG for the actual loss where the employee: voluntarily chooses not to travel and does not inform the Executive Director or designee of that decision with adequate time to cancel or change the travel plans. No reimbursement is required where, upon approval of the Executive Director, an alternate employee or Board member assumes the original employee's place.

AMBAG ADMINISTRATIVE POLICY No.3
DISPOSITION OF SURPLUS PROPERTY

I. POLICY

1. "Surplus property" shall be defined as supplies, materials, or equipment no longer used or needed by AMBAG, or which have become obsolete or worn out.
2. Each item to be declared as surplus property shall be identified by description, serial number or other identification number, acquisition date, original acquisition cost, funding source, percentage of federal participation in the cost of the item, item location, use and condition, and other disposition data including the anticipated date of disposal and sale price, as appropriate.
3. The Board of Directors shall declare appropriately identified items as surplus property by resolution prior to disposition.
4. The Executive Director or his/her designee shall implement the most appropriate, cost-effective disposal procedures in accordance with any one or combination of the following methods:
 - (a) Participation by AMBAG in another local agency's public agency auction sale, where participation requires no or minimal payment by AMBAG to the coordination agency, and where AMBAG may realize reasonable profit;
 - (b) Conveyance of surplus property to other government agencies, school, or non-profit organizations by direct negotiated sale;
 - (c) Donation of surplus property to other government agencies, schools, or non-profit organizations if it is for a public purpose of, and of benefit to, AMBAG;
 - (d) Disposition of remaining items to local landfill.
5. Employees may **NOT** participate in any public auction sale that includes AMBAG surplus property.

Adherence to the Code of Federal regulations is required for surplus property that was originally grant funded. The Code of Regulations (49 CFR 18.32(e)) states that "(1) Items of equipment with a current per-unit fair market value of less than \$5,000 may be retained, sold or otherwise disposed of with no further obligation to the awarding agency. (2) Items of equipment with a current per unit fair market value in excess of \$5,000 may be retained or sold and the awarding agency shall have a right to an amount calculated by multiplying the current market value or proceeds from the sale by awarding agency's share of the equipment."

II. PROCEDURES

<u>Responsible Staff</u>	<u>Action</u>
Administrative Section	Annually evaluates AMBAG's fixed asset physical inventory and prepares a listing of all supplies, materials or equipment, which are no longer functional, used, or needed.
Administrative Section	Finalizes Listings of Proposed Surplus Property and appropriate resolution and presents these documents to the Board of Directors for review and approval.
Board of Directors	Approves or denies Listing of Proposed Surplus Property. Approval is designated by adoption of resolution.
Executive Director or his/her Designee	Determines most appropriate, cost-effective method for disposing of items declared "surplus" by the Board of Directors , in accordance with disposition methods outlined in the policy above. Directs staff appropriately.
Administrative Section	Maintains file of all surplus property disposed of in accordance with this policy; ensures that surplus property dispositions are removed from service in the Fixed Asset Physical Inventory Listing following disposition.

AMBAG ADMINISTRATIVE POLICY No. 4
GENERATIVE AI TOOLS

1. Publicly available applications driven by generative artificial intelligence (“GenAI”), such as chatbots (e.g. ChatGPT, Google’s Bard, Microsoft Bing) or image generators (e.g. DALL-E 2, Midjourney) are widely available and generally helpful. But, while these content-generating tools may offer attractive opportunities to streamline work functions and increase our efficiency, they come with serious security, accuracy, and intellectual property risks. This policy highlights the unique issues raised by GenAI, helps AMBAG employees and officers understand the guidelines for its acceptable use, and protects AMBAG’s confidential or sensitive information, trade secrets, intellectual property, workplace culture, commitment to diversity, community perception, and community trust. Failure to abide by this policy can seriously jeopardize AMBAG, its members, and community and therefore, may be grounds for employee discipline.
2. This policy applies to all AMBAG employees regarding the use of any third-party or publicly available GenAI tools, including, but not limited to, ChatGPT, Google Bard, DALL-E, Midjourney, and other similar applications that mimic human intelligence to generate answers, work product, or perform certain tasks.
3. Guidelines:
 - Understand that GenAI tools may be useful but are not a substitute for human judgment and creativity.
 - Understand that many GenAI tools are prone to “hallucinations,” false answers or information, or information that is stale, and therefore responses must always be carefully verified by a human.
 - Treat every bit of information you provide to an GenAI tool as if it will go viral on the Internet, attributed to you and AMBAG, regardless of the settings you have selected within the tool (or the assurances made by its creators).
 - Inform your supervisor when you have used a GenAI tool to help perform a task.
 - Verify that any response from an GenAI tool that you intend to rely on or use is accurate, appropriate, not biased, not a violation of any other individual or entity’s intellectual property or privacy, and consistent with AMBAG policies and applicable laws.
 - If using a GenAI notetaker application, the AMBAG employee is responsible for personally reviewing the notes to ensure accuracy.
 - When using a GenAI notetaker application, the AMBAG employee

will be responsible for clearly obtaining consent of all participating parties at the beginning of the meeting or conversation where GenAI is taking notes.

- Be hyper aware that malicious chatbots can be designed to steal or convince you to divulge information.
 - Do not use GenAI tools to make or help you make employment decisions about applicants or employees, including recruitment, hiring, retention, promotions, transfers, performance monitoring, discipline, demotion, or terminations.
 - Do not upload or input any confidential, proprietary, or sensitive AMBAG or AMBAG member information or personal information into any GenAI tool. Examples include passwords and other credentials, protected health information, personnel material, information from documents marked “Confidential,” “Sensitive,” or “Proprietary,” or any other nonpublic AMBAG information that might be of use to competitors or ill-wishers or harmful to AMBAG if disclosed. This may breach your or AMBAG’s obligations to keep certain information confidential and secure, risks widespread disclosure, and may cause AMBAG’s rights to that information to be challenged.
 - Do not upload or input any personal information (names, addresses, likenesses, etc.) about any person or entity into any GenAI tool.
 - Do not represent work generated by a GenAI tool as being your own original work. Inform your manager or supervisor when you have used a GenAI tool to help perform a task.
 - Do not use a GenAI notetaker application for privileged or confidential conversations.
 - Do not integrate any GenAI tool with internal AMBAG software without first receiving specific written permission from your supervisor and AMBAG’s IT Department/Contractor.
4. Use of GenAI in any instance must be expressly disclosed to your manager or supervisor. Generally acceptable uses of GenAI include the following. If you are unsure, or the situation is unique, contentious, or confidential, please consult with your manager or other supervisor prior to using GenAI. Use in these instances must still be disclosed to your manager or supervisor.
- For general-knowledge questions meant to enhance your understanding on a work-related topic.
 - To brainstorm ideas related to pending projects.
 - To create formulas for spreadsheets.
 - To prepare an initial draft of an email or letter.
 - To summarize online research or to create outlines for pending projects.

- To take notes during a meeting, which you later will review and confirm comport with your memory of meeting deliberations.
5. Absolutely unacceptable uses include:
 - Using any text created by an GenAI as the exclusive final work product of any kind.
 - Copying and pasting, typing, or in any way submitting AMBAG or AMBAG member information or personnel data into the GenAI.
 - Failing to properly cite an GenAI when used as a resource.
 6. Violating this policy may result in disciplinary action, up to and including termination, and could result in legal action. If you are concerned that someone has violated this policy, report this behavior to your supervisor or the Executive Director.
 7. Nothing in this policy is designed or intended to interfere with, restrain, or prevent employee communications regarding wages, hours, or other terms and conditions of employment or any other rights protected by the National Labor Relations Act.

AMBAG ADMINISTRATIVE POLICY No. 5

TECHNICAL ASSISTANCE GUIDELINES

AMBAG is a resource for social, economic, demographic, environmental, and transportation data for Monterey, San Benito, and Santa Cruz Counties. AMBAG also provides technical assistance for complex data collection and analysis requests, planning services, and transportation impact analysis.

Under agreement with the California State Department of Finance, AMBAG is the U.S. Census Bureau's Regional Data Center for the area. As a Regional Data Center, AMBAG is the primary local point of contact for census data.

Census data is provided to the public in several ways with census summary products for common data requests already created by AMBAG. The Census bureau's website, <https://www.census.gov/>, can be queried for all census data, from local to national levels. In addition to digital data distribution, AMBAG staff is available to provide data to member jurisdictions and the public by email, phone and fax.

Assistance with basic data requests is provided to member jurisdictions and to the public for free, for more information visit our website, <https://ambag.org/program/member-services>. Requests that require more than two hours work for member agencies, or one hour work for non-member agencies and the public, can be completed for a fee. A written request for services, and authorization to incur the costs required to provide the requested assistance, is required before technical assistance can be provided.

Brief description of assistance requested:

Date needed: _____

Estimate of Cost (To be completed by AMBAG staff): _____

Name: _____

Agency/Business: _____

Phone: _____; Fax: _____

Mailing Address:

Purchase Order Number: _____
Authorized Signature of Agency/Business: _____

AMBAG Fees for Materials

- Email or upload to online cloud data sharing options (Sharepoint, OneDrive, Google Drive, Dropbox)
- Photo copies: \$0.10 per page; \$5 if mailed.
- 8.5"x11": No-Fee if picked up at AMBAG's office; \$5 if mailed.
- 11x17: \$25 fee, each.

AMBAG ADMINISTRATIVE POLICY No. 6

PUBLIC RECORDS REQUEST

This policy is intended to assure that AMBAG complies with the California Public Records Act (Gov. Code § 6250, et seq.) (CPRA). The manner in which AMBAG records are maintained is set forth in Policy No. 5, Records Management.

DEFINITIONS

“Public Record,” as defined by the CPRA, means “any writing containing information relating to the conduct of the public’s business that is prepared, owned, used, or retained by any state or local agency regardless of physical form or characteristics.” See the definition of “Writing” below for more information.

“AMBAG business record” means a writing that is prepared, owned, used, or retained by the agency because it contains information related to AMBAG business.

“Writing” includes, but is not limited to, handwriting, printing, photographing, photocopying, scanning, transmitting by electronic mail or text message (including symbols and emoticons), and every other means of recording information. It also includes any form of communication or representation, including letters, words, pictures, sounds, or symbols, or combinations thereof, and any record created, regardless of the manner in which the record has been stored.

1. GENERAL

Consistent with AMBAG Policy No. 5, responses to records requests shall be fully compliant with the CPRA and all other applicable laws. Except for records exempt from disclosure by law, records responsive to a request that reasonably describes identifiable AMBAG business records shall be made available to the requesting party.

2. PROCEDURE

Requests for Copies of AMBAG Business Records

Requests for copies of AMBAG business records may be made by email or in writing. The AMBAG website contains a link to facilitate requests from the public, publicrecordrequest@ambag.org. It is the responsibility of the Clerk of the Board or their designee to monitor the email account, notify the Executive Director of incoming requests and forward the request to appropriate staff for timely response.

It is the responsibility of AMBAG staff to promptly notify the Executive Director of requests for public records received in writing. The Executive Director will assign appropriate staff to address the request.

Requests must be focused and sufficiently clear so that AMBAG staff can reasonably identify the record or records that are being sought. If AMBAG receives a request that does not sufficiently describe an identifiable record, AMBAG will contact the requesting party and attempt to assist the requester in making a focused and effective request that will result in disclosable records. Reasonable restrictions may be imposed upon general requests for voluminous classes of documents.

Records that are exempt from disclosure under the CPRA or other applicable law will be redacted or withheld pursuant to the CPRA. The reasonably segregable portion of the record shall be made available after deletion or redaction of the portions that are exempted by law and a copy shall be provided unless it is impracticable to do so.

Copies of disclosable records will be provided by the Clerk of the Board or their designee through the publicrecordrequest@ambag.org within the timelines described below. If a delay occurs, the requester will be notified of the reasons and offered the ability to inspect any portion of the record that is available.

In the event the requester does not provide an email address, the Clerk of the Board will mail the response to the physical address provided. The original request and the response will then be retained in the (S drive).

Requests for Access to Inspect Specific Files

AMBAG business records are open to inspection at all times during AMBAG office hours and every person has a right to inspect any disclosable record. To permit sufficient time for AMBAG to collect the records for review, it is recommended that the requester describe the records with sufficient specificity ahead of time to enable AMBAG to identify the records sought and schedule an appointment with AMBAG staff to view the records.

AMBAG staff will be available to assist the requester during the inspection and will be present during the review to ensure that no records are removed or altered. If the requester asks for photocopies of records, AMBAG staff will arrange for payment by the requester in advance of the copies being made and will promptly make requested copies available to either be picked up at the AMBAG offices or mailed.

Response Time

AMBAG shall determine within ten calendar days from receipt of the request if the request, in whole or in part, seeks copies of disclosable records in the possession of AMBAG. If

additional time is needed pursuant to the CPRA, AMBAG will provide an estimated date and time when the records may be made available.

If responsive records exist but will not be produced because they are exempt under the law, AMBAG will notify the requester of the reason(s) for that decision. AMBAG will assist members of the public in identifying records and will provide suggestions, if any, for overcoming any practical basis for denying access to the records sought.

3. FEES

Duplication

When applicable, records will be provided electronically through email. If hard copies are requested, there may be a charge to cover the direct costs associated with duplication. There is no charge for photocopies or printouts totaling less than ten pages or for records that have been pre-prepared by AMBAG for public distribution. For ten or more pages, the printing and photocopying fee currently is 15 cents per page. If the record is larger than 8 ½ inches by 14 inches, then AMBAG will determine the direct cost of duplicating that record regardless of the quantity of pages. AMBAG will provide an invoice for any charges due, including the direct cost to mail documents if the requester chooses not to pick them up at the AMBAG offices. These charges are due and payable upon receipt of the invoice and must be paid prior to duplication.

Electronic Media

If the requester seeks production of the records on a flash drive or other storage medium, AMBAG will provide an invoice for any charges due, including the direct costs of the flash drive or other storage medium and for the direct cost of mailing if the requester chooses not to pick it up at the AMBAG offices. These charges are due and payable upon receipt of the invoice and must be paid prior to production of the records.

Data Compilation or Extraction

A request to AMBAG for information that requires data compilation, extraction, or programming to produce the record is not a request for an existing identifiable record and therefore is not required to be produced under the CPRA. If AMBAG determines in its sole discretion that it will produce such a record through the performance of additional work, the requester shall bear the full direct costs associated with generating the record, including any staff or consultant time. AMBAG will provide an invoice for any charges due. These charges are due and payable upon receipt of the invoice and must be paid prior to duplication.

AMBAG ADMINISTRATION POLICY NO. 7

RECORDS MANAGEMENT

These procedures are intended to ensure the safekeeping of AMBAG records with administrative, legal, fiscal, programmatic or historical value; provide ease of access to AMBAG records by staff; provide ease of access to AMBAG records by members of the public in accordance with AMBAG's Public Records Request Guidelines; and provide the necessary guidance to ensure proper records management, including retention and disposition.

AMBAG's records are a valuable resource. This policy provides procedures to ensure AMBAG's records are maintained in a consistent, orderly, secure and accessible manner.

Procedures

1. Policy Statement

- 1.1 Records kept by a AMBAG employee because they are necessary or convenient to the discharge of that employee's duties for AMBAG are public records. Any and all records generated in the course of AMBAG business are the property of AMBAG. These records include, but are not limited to, correspondence, memoranda, emails, phone logs, reports, maps, tapes, contracts, project files, photographic files, digital imagery data, prints, charts, drawings, machine-readable records, videos, and audio tapes. Persons to whom this policy applies should pay particular attention when using e-mail or other less formal forms of communication to ensure that matters discussed are handled with due care and reviewed for professionalism, accuracy and objectivity as they are discoverable public records that can be used as evidence in litigation.
- 1.2 Records must be maintained in accordance with the AMBAG Records Retention Schedule until their retention period expires, after which the records should be disposed of promptly and appropriately. The periods shown in the Records Retention Schedule are minimum time periods that do not start until the document and/or project is complete. Records can be maintained for time periods in excess of the retention period in the schedule if the records are still needed for reference.

2. Application

This policy applies to all persons, including employees, consultants, and contractors,

responsible for the generation and/or maintenance of AMBAG records.

3. Public Records

- 3.1 Records that pertain to “housekeeping” matters that will not be needed for future reference may be disposed of immediately. For example, preliminary drafts, notes, and interagency and intra-agency memoranda that have been retained for less than 60 days and that are no longer needed for use or reference should be disposed of immediately. All records that are kept for more than 60 days for use or reference by an employee must be treated as a public record. All public records must be kept for a minimum of two years after the date they are finalized. Some records must be kept for longer than two years and the retention period for most records is contained in the Records Retention Schedule. The time periods shown in the Records Retention Schedule should be followed unless a document needs to be retained for a longer time period than that shown because the custodian believes the record is still needed for reference. All of the time periods shown for retention begin on the date the record is put in its final form.
- 3.2 Records that are purely personal in nature such as shopping lists, personal email, or correspondence from a friend should not be treated as public records. In order to prevent a claim that such records are subject to disclosure, and to prevent an unnecessary burden on AMBAG resources, however, records unrelated to AMBAG business should be purged from AMBAG computers and files.
- 3.3 After a public record has been maintained for the required time period it should be disposed of promptly. If records contain confidential or trade secret information, steps should be taken to ensure the records are not disclosed when they are destroyed.
- 3.4 The Records Retention Schedule will be reviewed and revised as needed every three years
- 3.5 Records may be kept in electronic form instead of hardcopy form if the following conditions are met:
 - 3.5.1 The media on which the electronic form of the record is kept does not permit additions, changes, or deletions of the information or image in or on the original record.

- 3.5.2 The media selected for storing the records in electronic form is considered permanent and reliable.
- 3.5.3 The media selected for storing the records in electronic form does not prevent the records from being easily accessible.
- 3.5.4 The copy must be kept in a safe and separate place for security purposes.
- 3.6 Retention periods for records required for current litigation, audit, or environmental review must be suspended and the records maintained in their original condition and format until the matter is resolved.
- 3.7 Duplicates of hardcopy records may be destroyed at any time as long as at least one accurate and legible copy is maintained for the time period set forth in the Records Retention Schedule.

4. Project File Maintenance

The project manager(s) for a project and Procurement personnel (“project team members”) should maintain centralized files for each project. The project files should not contain preliminary drafts, working papers, notes, or “housekeeping” memoranda or emails that are not needed for future use or reference (as these records should be discarded if they are less than 60 days old). The project team members should keep the following documents in centralized files:

- Project authorization
- Original purpose and justification documentation
- Project team responsibilities and goals
- Budget and source of funding documentation
- Schedules
- Work Products
- Consultant/Contractor deliverables
- Final project evaluation
- A list of the names and job positions of the members of the evaluation committee
- Conflict of Interest Declarations from outside evaluators
- The evaluation forms and score sheets for all proposers
- Any protests or other complaints filed with AMBAG concerning the contract award, and any responses thereto
- Correspondence with proposers and potential proposers

- Questions from proposers and AMBAG's responses
- Notices and correspondence with the selected consultant/contractor
- The RFP and/or RFQ
- Independent Cost Estimate
- Sole source approval forms (if necessary)
- Written approval of funding source (if necessary)
- Copy of Board Resolution (if necessary)
- Mailing list for RFP/RFQ
- Copies of newspaper advertisements
- The recommendation memo and approval to begin contract negotiations
- Notice of Intent to Award
- Notices of Intent to Proceed with Another Proposer
- Copy of selected consultant's proposal
- Cost Analysis (if applicable)
- Any record of negotiations
- The negotiated agreement with all exhibits
- Amendments to the agreement
- Certificates of Insurance
- Pre-award audit request and audit results documentation
- Notice to Proceed
- Work Orders or Task Orders
- Notice of Completion
- DBE documentation

Records Containing Confidential or Trade Secret Information

Records created at or received by AMBAG containing confidential or trade secret information must be marked as such and filed in a locked cabinet or other location where the records will be secure and inaccessible to third parties. Staff should take all necessary steps to ensure that such records are not copied or disclosed to third parties. Once a record is submitted to AMBAG by a company or individual it immediately becomes a public record unless that party has expressly designated the record or portion thereof as confidential, proprietary, or trade secret. For example, unless a proposal or price list from a consultant or contractor is clearly marked as confidential or trade secret it will automatically become a public record. Note, however, that even if a consultant or contractor marks a document as "confidential," proprietary," or "trade secret" this will not necessarily exempt the document from disclosure under the California Public Records Act or other applicable laws.

5. Public Records Requests

- 5.1 Generally, the following types of records can be provided to persons based on a simple verbal request to a staff member:
- Bound AMBAG reports
 - Information bulletins
 - Fact sheets
 - Board agendas, resolutions, and reports
 - Committee agendas and reports
 - Letters in support of, or opposition to, bills
- 5.2 Requests from members of the public for compilations of AMBAG records, a large number of copies, or records that contain confidential or sensitive information should be referred to the Executive Director. If the following types of records are requested, the staff member should refer the request to the Executive Director:
- Requests for all records of a certain type or category
 - Requests for compilations of data
 - Requests for accounting or financial records
 - Requests for records containing trade secret, confidential, or proprietary information or marked “confidential” or “trade secret” or “proprietary”
 - Requests for records containing social security numbers or private individual’s phone numbers or addresses
 - Requests for copies of proposals and/or cost estimates from proposers
 - All written requests for AMBAG public records referring to the California Public Records Act or the federal Freedom of Information Act
 - All requests from attorneys for records
- 5.3 The above list is not exhaustive. If a staff member is unsure whether a particular type of record should be released, the staff member should refer the request to the Executive Director who will prepare an appropriate response.
- 5.4 Timing on responses to public record requests is very important. Under the law a response must be provided to the requester within ten (10) calendar days. If a staff member is unable to meet this deadline, the staff member should immediately contact the Executive Director.



AMBAG ADMINISTRATION POLICY NO. 8

Records Retention Schedule 2026

All Staff

Record Category	Retention (In Years)	Description
General Correspondence (Letters, Text messages and Email)	2	General Correspondence, including letters, text messages, and email. Also includes various files not otherwise specifically covered by the retention schedule if they are needed or beneficial for future use in reference and retained for more than 60 days. Housekeeping matters are not AMBAG Business Records and may be deleted at any time.
Draft Documents	See Description	With regard to preliminary drafts, notes, and interagency and intra-agency memoranda, if retained for less than 60 days, and no longer needed for use or reference than should be disposed of. If retained for more than 60 days for use or reference, then must be kept for a minimum of 2 years.
Project Management Files	2	Substantive and necessary correspondence about specific ongoing project. Information should include all staff meeting notes, team agendas, etc. See specific departments for additional guidance.

Various Departments

Record Category	Retention (In Years)	Description
Procedure Manuals	Until superseded then 2 years	Human Resources Manual, Procurement Manual, Administrative Policies and other documents that memorialize AMBAG internal policies and procedures.

Accounting and Finance

Record Category	Retention (In Years)	Description
Accounts Payable	Permanent	Journals, journal voucher, statements, asset inventories, account postings with supporting documents, vouchers, investments, invoices and back-up documents, purchase orders, petty cash, postage, PERS reports, check requests, etc.
Accounts receivable	7	
Annual Financial Report	Permanent	Includes audit administration records and reports, audit hearing or review and independent auditor analysis.
Annual Operating/C.I.P. Budget	Permanent	

Bank Account Reconciliations	5	Includes deposit correspondence, deposit slips, bank statements, receipts, certificates of deposit, etc.
Credit Card Statements	Permanent	
Electronic Transactions	10	
Fixed Assets	Until audited + 4 years	reflects purchase date, cost, account number; includes information on disposal of property and all paperwork associated with asset ownership such as inventory and maintenance records.
General Ledger	Permanent	All annual financial summaries
Petty Cash Request	3	
1098 and 1099 Tax Forms (Vendors)	8	
California State Tax Records	8	Forms filed annually; quarterly and year-end reports
Federal Tax Records	8	May include as attachments copies of Forms 1095-C, 1096, 1099, W-4 and W-2
Tax Returns	Permanent	
Travel Expense Statements	Permanent	
W-2 Register	Permanent	
Wage Garnishment	Active until garnishment is satisfied; then until audited + 4 years	Wage or salary garnishment
Petty Cash Requests	3	
1098 and 1099 Tax Forms (Vendors)	8	
California State Tax Records	8	Forms filed annually, quarterly, and year-end reports

Business Information and Technology Services

Record Category	Retention (In Years)	Description
Network and other computer access logs, etc.	2	Audit records of activities such access logs
Network infrastructure information	While active + 2 years	Network infrastructure information such as network configuration and firewall rules
Back-up information of AMBAG Network	6 weeks	Off-site back-up tapes are for disaster recovery purposes only.

Clerk of the Board

Record Category	Retention (In Years)	Description
Agenda Packets	Permanent	Board of Directors and Policy Advisory Committee meeting agendas, reports, meeting minutes, resolutions, ordinances & Public Hearing Notices.
Board of Directors, Policy Advisory Committee, Subcommittee and Working Groups Meeting Audio and Video Recordings	Permanent	Audio and Video Recordings of meetings are stored electronically.
Board of Directors and Policy Advisory Committee Member Payments	7	Maintains permanently as Accounts Payable by Finance
Bylaws, Governing Documents, and Board Policies	Permanent	
Conflict of Interest Code	Permanent	Required under the Political Reform Act; must be reviewed by July 1st of every even-numbered year and amended if necessary.
Resolutions	Permanent	
Statements of Economic Interest – Forms 700 copies	Retained by AMBAG and the FPPC	Downloaded from the FPPC's eDisclosure's site upon request.

Contracts & Procurement Services

Record Category	Retention (In Years)	Description
Agreements/Contracts	10 years from contract close-out	This category of records includes all original contract files (including leases, license agreements, MOUs/MOAs, work orders, etc.) regardless of discipline/topic, task orders, amendments, and all documentation/correspondence related to contract management.
Bids and Proposal, Successful	10 years from contract close-out	Includes plan and specifications; notices/affidavits.
Bids and Proposals, Unsuccessful	2	
Procurement Documents	5	This category of records includes all original procurement related materials such as RFPs, RFQs, IFBs, prequalification requests, proposals and pricing data received, evaluation committee declarations, score sheets, all notices related to intent to award/negotiate. Note, this category does not include unsuccessful bids and proposals, see above for retention period.
Fixed Assets, Vehicle Ownership & Title	Life of the asset + 3 years	Includes title transfers when vehicle is sold. All paperwork will be kept three years beyond the life or AMBAG ownership of the asset.

Criminal Justice Research

Record Category	Retention (In Years)	Description
Clearinghouse Records (crime, arrest, SCAAP, and jail data)	Permanent	Varies by application.
Substance Abuse Monitoring (interviews with arrestees and urinalysis results)	7	

Program Evaluations	7 years unless otherwise specified by the granting agency	
Exclusion and Debarment Checks	7	CJ will retain Exclusion and Debarment Checks for 7 years to ensure that its employees and directors have not been debarred, excluded, suspended, or declared ineligible to perform work on federal, state, or local contracts.

Diversity and Equity

Record Category	Retention (In Years)	Description
SBE/DBE	3	Records documenting AMBAG's efforts to provide economic opportunities to small and/or disadvantaged businesses.
ADA (Americans with Disabilities Act)	Permanent	General Correspondence, information and resources, transition plans, complaint records
Pre-apprenticeship Program Records	5	Records tracking student backgrounds and career advancement

Editorial Outreach, PIO, Visual Communications

Record Category	Retention (In Years)	Description
Language Assistance Program Policy and Procedure Documents	5	
Language assistance Program: Translated AMBAG Documents	2	Refers to major AMBAG documents translated from English, such as Board Policies, Meeting Minutes, etc.
Brochures, Reports, Publications and Newsletters	2	
Presentations and Speeches	2	
Marketing, Promotional and Advertising	2	Brochures, announcements, marketing campaigns, promotional events, etc.
Press Releases and Advisories	2	Related to AMBAG actions/activities
Public Ceremonies and Event Preparation	2	
Legally Required Advertising	4	
Public Inquiries Requests and Complaints	2	
Graphics and Images	2	

Facility Management & Business Services

Record Category	Retention (In Years)	Description
Accident Reports, AMBAG Vehicles	2	
Accident/Incident Reports, non-AMBAG Vehicles	2	Does not include reports of injuries to AMBAG employees
Affidavits of Publication/Posting of Legal and other Notices	2	Notices of public hearings and proof publication notices; Legal notices for public hearings, publication of ordinances, etc.

Recordings – routine video monitoring	1	Recordings of routine video monitoring, monitoring systems, or building security systems
Work/Orders Service Requests (Requests for maintenance on equipment)	2	See email retention policy
Records Management Disposition/Deconstruction Certification	Permanent	Documentation of final disposition/destruction of hard copy records located at the AMBAG offsite facility
Bonds – Employee (Fidelity Bonds)	2	Form of insurance that covers employer for losses resulting from fraudulent acts of specified employees
Disaster Preparedness Planning, Risk Management Reports, Studies and Surveys	5	

Financial Strategy & Programing

Record Category	Retention (In Years)	Description
RTP Revenue Forecast	10	
RTIP	Permanent	
State and Federal Funding Programs	10	This category includes records related to, SB 1, and Similar funding sources.

Government Relations

Record Category	Retention (In Years)	Description
Legislative Working Files	2	Successful, pending, and failed legislative activities and general correspondence with elected officials at the federal, state, and local level.
Legislative Support/Opposition	2	Requests and Responses

Grants

Record Category	Retention (In Years)	Description
Grants Administration and Oversight	5, but see notes	Please check grant agreement for audit and retention timeframes. FTA Required Retention Period is three years (for grant-funded contracts, documents/ records) commences after completion of all FTA funded work and administrative matters are close.
Grants Successful Applications	Granting agency requirement or 7	Follow state and federal grant requirements as applicable. Grant documents and all supporting documents; applications, reports, contracts, project files, proposal, statements, sub-recipient dockets, environmental review, inventory, consolidated plan, etc.
Vehicle ownership documents/titles	Hard copy (original paper) permanent	

Human Resources

Record Category	Retention (In Years)	Description
Accident/Illness Report	Permanent	Exempt from public disclosure; For Employee Medical Records & Employee Exposure Records regarding exposure to toxic substances or harmful physical agents—including Material Safety Data Sheets (MSDS). Does NOT include: records of health insurance claims maintained separate from employer's records; first aid records of one-time treatments for minor injuries; records of employees who worked less than one year (1) year of records are given to employee upon termination.
Benefits, Retired Employee Files	Permanent	
Compensation Plans	6	
DMV Driver's Records Reports (DMV pull-notice systems)	Until termination + 7 years	Motor vehicle pulls – personnel record – exempt from public disclosure.
Employee Benefits Plans	Life of plan/policy + 6 years	Benefit plans; health insurance programs; records regarding COBRA – extension of benefits for separated employees; insurance policies (health vision, dental, deferred compensation, etc.) retirement plans and mandated programs (i.e.; unemployment and disability).
Employee Files	Permanent	Personnel file – exempt from disclosure
Employee recruitment Information and Applicant Identification Records, Advertising	Current + 2 years	Employment applications, position announcements, applicant lists, other recruitment-related records.
Employee Information, general	Permanent	Includes name, address, date of birth, occupation, SSN, rate of pay, as well as other records, including benefits, dependents, emergency contacts, etc.
Employee Medical and Exposure Records (toxic substances or harmful physical agents)	Permanent	Medical records are part of personal files – not for public disclosure. Includes medical records made or maintained by a physician, nurse, or other health care personnel, or technician pertaining to employees exposed to toxic substances or harmful physical agents.
Employment Eligibility Verification (I-9 Forms)	3 years after date of hire OR 1 year after date of termination whichever is later	Federal Immigration and Nationality Act
Employment, Personnel Training (by name)	While employed + 2 years	Paperwork documenting internal and external training. See also Training section below.
Equal Employment Opportunity Commission (EEOC Records)	5	Records, reports showing compliance with federal equal employment requirements (EEO-4 Reports, etc.)
Family and Medical Leave Act	Permanent	Records of leave taken, AMBAG policies relating to leave, notices, communications relating to taking leave.
Grievances and Investigations	Permanent	
Job Descriptions and Specifications	6	Descriptions of duties, qualifications, responsibilities for each position/classification/job title.
New Position Requests	3	
Organization Charts	Permanent	
PERS Reports	Permanent	
Surveys, Employee opinions	2	GC 12946 does not discuss surveys/employee opinions
Training, Mandatory training programs	5	Includes orientation, ethics, sexual harassment and other mandatory trainings as well as all sign-in sheets/records of attendance and materials used in performing the training.
Unemployment Claims	Permanent	
Workers' Compensation Files	Permanent	Includes work-injury claims (including denied claims); claim files, reports, etc.
Records of Safety Program Development and Training	3	Training attendance and certification 2 years under 29 CFR 1620.32 (Equal Pay Act)

Modeling

Record Category	Retention (In Years)	Description
Census/American Community Survey	Permanent	Files in SQL database
Economic Demographic/Statistical Data for Agency Programs	Permanent	Custom data for agency programs
Economic Forecasts	Permanent	
Estimates	Permanent	Annual estimates of population and housing characteristics.
Growth Forecasts used in Regional Plan	Permanent	
Transportation Model Runs used in Final Version of Long- and Short-Range Planning Documents and Associated Environmental Clearance Documents	Permanent	
Model Runs used to Inform Draft of Long- and Short- Range Planning Documents and Associated Environmental Clearance Documents	1 year after Stature of Limitations expires or after completion of lawsuit	Keep as needed to inform final versions.
EDD Quarterly Census of Employment and Wages	Per contract requirements with EDD	Data is to be disposed or after the purpose for which the confidential information is disclosed is served
GIS Central Database (GEODEpot)	Permanent	Most datasets are refreshed as updates become available, historical snapshots are taken for some (Census, Land Use, Parcels)
Land Use Database (SPACECORE)	Permanent	Data is updated on an annual basis
GIS Project Files	Permanent	Short term projects; data retained to inform future projects

Legal

Record Category	Retention (In Years)	Description
Claims Against AMBAG	10	All claims and supporting materials including settlement agreements.
Fair Political Practices Commission Form 801	7	FPFC form showing payment or donation made to AMBAG or to an AMBAG official and which can be accepted as being made to AMBAG. A COPY MUST BE POSTED ON THE AMBAG WEBSITE.
Legal Opinions	Permanent	Confidential – not for the public disclosure (attorney-client privilege)
Litigation Files	10	
Public Records Requests	5	
Records Retention Schedule	2	The records retention schedule should be reviewed every three years. Previous version must be retained for two years.

Regional Planning

Record Category	Retention (In Years)	Description
Air Quality (Transportation program to improve air quality)	7	
Air Quality Conformity	Permanent	

Final CEQA/NEPA documents for AMBAG projects	Permanent	Exemptions/exclusion, Environmental Impact Report/Environmental Impact statement, FONSI, initial studies, Mitigation Monitoring, negative declaration, notices of completion and determination, comments, statements of overriding considerations, studies, etc.
Draft CEQA/NEPA documents prepared by AMBAG as the lead agency and circulated public review	2 years after statute of Limitations expires or after completion of lawsuit	
Draft NEPA documents for AMBAG projects circulated for public review	2 years after statute of Limitations expires or after completion of lawsuit	
Environmental Justice and Title VI	10	Programmatic and project specific documentation
Intergovernmental Review	10	Comments produced by AMBAG staff environmental documents received by AMBAG for review as the Clearinghouse
Long-Range Planning Documents – Final Version	Permanent	This category includes records in the areas of energy, freight, binational, habitat, shoreline, sustainability, transportation, transit, active transportation, tribal, military, housing, and corridor planning studies.
Long-Range Planning Documents – Draft Versions	60 days or 2 years consistent with Board Policy No. 15	Keep as needed to inform final versions.

Notes:

- The applicable retention periods begin once a project has been closed out or final action has been taken, such as adoption by the Board.
- All files may be kept in a digital format unless otherwise stated, such as conveyances or land, vehicle titles, etc.
- All questions and concerns should be discussed with the Executive Director.
- In the event of litigation, a program audit or review, an environmental review, or CPRA request, the usual retention period for business records must be suspended and the records must be maintained in their original condition and format. Employees shall use reasonable means to preserve applicable records until such time as they are notified by the Executive Director that the matter has been resolved.

AMBAG Policy No. 9

AMBAG RULES OF DECORUM-LEGISLATIVE BODY MEETINGS

In order to ensure that public meetings of Association of Monterey Bay Area Governments (AMBAG) Board of Directors, Executive/Finance Committee, and any other legislative bodies created by AMBAG and are subject to the Open Meeting Laws of California, The Ralph M. Brown Act, are conducted in the most efficient manner, AMBAG desires to establish rules of conduct suitable for such meetings.

SECTION 1:

Definitions:

Legislative body shall mean AMBAG Board of Directors, Executive/Finance Committee, Regional Analysis Planning Services, Inc., and any other legislative body that is created by AMBAG and is subject to the Open Meeting Laws of California, The Ralph M. Brown Act.

Meeting site shall mean any location in which a legislative body as defined herein is meeting including, but not limited to, the MBARD Board Room, 24580 Silver Cloud Court, 3rd Floor, Monterey, CA 93940.

Presiding Officer shall mean, in case of the AMBAG Board of Directors and Executive/Finance Committee, the President or, in absence of the President, the 1st Vice President or, in the absence of both the President and 1st Vice President, the 2nd Vice President or, in absence of the President, 1st Vice President, the 2nd Vice President, the Past President.

SECTION 2:

Preservation of Order:

Meetings of a legislative body as herein defined shall be conducted in an orderly manner to ensure that the public has a full opportunity to be heard and that the deliberative process of the legislative body is conducted as efficiently as possible. The presiding officer shall be responsible for maintaining the order and decorum of meetings.

Rules of Decorum:

A. Members of a Legislative Body. The members of a legislative body as herein defined shall preserve order and decorum, and a member shall not by conversation or other means delay or interrupt the legislative body's proceedings including delaying or interrupting the person who is speaking who has been recognized by the presiding officer.

B. Staff Members. AMBAG Staff shall observe the same rules of order and decorum as those that apply to members of the legislative body.

C. Person addressing the legislative body. Members of the public are afforded the opportunity to address the legislative body on any item of interest to the public that is within the subject matter jurisdiction of the legislative body. Each person who addresses the legislative body shall do so in an orderly manner and shall not make personal, impertinent, slanderous, or profane remarks to any member of the legislative body, staff, or general public that disrupt , disturb, or otherwise impede the orderly conduct of any meeting of the legislative body.

Any person who makes such remarks; or who utters loud, threatening, personal, or abusive language; or engages in any other disorderly conduct that disrupts, disturbs, or otherwise impedes the orderly conduct of any meeting of the legislative body, including, but not limited to, addressing the legislative body without being recognized, repetitiously addressing the same subject, or failing to relinquish the podium when requested to do so, shall, at the discretion of the presiding officer, be barred from further audience before the legislative body during that meeting.

D. Members of the audience. No person in the audience at a meeting of the legislative body shall engage in disorderly or boisterous conduct, including the utterance of loud, threatening , or abusive language; whistling, stamping of feet; or other acts which disturb, disrupt, or otherwise impede the orderly conduct of any meeting of the legislative body. Any person who conducts himself or herself in the aforementioned manner shall, at the discretion of the presiding officer, be barred from further audience before the legislative body during that meeting.

Addressing the legislative body.

Any person wishing to address the legislative body regarding an item which is on the meeting agenda or is otherwise within the subject matter jurisdiction of the legislative body may submit a request on the form provided, or he or she may seek recognition by the presiding officer during discussion of any such item. Persons wishing to discuss a non-agenda item may seek recognition by the presiding officer during the Public Comment portion of the meeting. No person shall address the legislative body without first being recognized by the presiding officer.

The following procedures shall be observed by person addressing the legislative body;

A. Each person shall speak from the podium provided for the use of the public.

B. Each person shall confine his or her remarks to: (1) an agenda item before or during the legislative body's consideration of the item; or (2) any matter not on the agenda which is within the legislative body's subject matter jurisdiction.

C. Each person shall limit his or her remarks to two minutes, unless the presiding officer determines that a different time limit is appropriate.

Enforcement of Decorum:

The rules of decorum set forth above shall be enforced in the following manner:

A. Warning. The presiding officer shall request that a person who is violating the rules of decorum conform his or her behavior to these rules. If, after receiving a warning from the presiding officer, a person persists in disturbing the meeting, the presiding officer shall order him or her to leave the meeting.

B. Removal. If such person does not remove himself or herself from the meeting, the presiding officer may order law enforcement be called.

Any law enforcement officer who is serving as sergeant-at-arms may carry out orders and instructions given by the presiding officer for the purpose of maintaining order and decorum at the meeting. Upon instruction of the presiding officer, the sergeant-at-arms may remove from the meeting any person(s) who is (are) disturbing the proceedings of the legislative body in violation of these rules.

C. Resisting removal. Any person who resists removal by the sergeant-at-arms may be charged with a violation of this section.

D. Clearing the meeting site. In the event that any meeting is willfully interrupted by a group(s) of persons so as to render the orderly conduct of such meeting unfeasible and the order cannot be restored by the removal of individuals who are willfully interrupting the meeting, the presiding officer may order the room cleared and continue in session in conformance with provisions of The Brown Act, the presiding officer may subsequently readmit individuals not believed to be responsible for creating the disturbance into the meeting. If a meeting of the legislative body is disturbed or disrupted in such a manner as to make unfeasible or improbable the restoration of order, the meeting may be adjourned or continued; and any remaining business of the legislative body may be considered at the next meeting.

E. Online Public Comment Protocols

Clerk of the Board disorderly conduct script:

Chair: Madam Clerk, this individual is disrupting the orderly conduct of these proceedings.

Clerk: (Name of Individual), please do not disrupt the orderly conduct of these proceedings by using language that is considered abusive, offensive, harassing, or racist in nature. You are now muted. If you continue, you will be ordered to leave the meeting. You have been warned. You are now unmuted.

If the speaker continues:

(Name of Individual), you have been given a fair warning and have elected to disrupt this meeting. You are now ordered to leave the meeting.

Guidelines for Recording Meetings:

As provided by The Brown Act, members of the public are permitted to record any open and public meeting of a legislative body. In order to provide for the recording of such meetings by members of the public, AMBAG has developed the following guidelines:

A. The recording procedure must not disrupt, disturb, or otherwise impede the conduct of the meeting. A disruption or disturbance of the orderly conduct of the meeting can include, but is not limited to, the following:

1. Obstruct the view of audience/staff members.
2. Create noise that keeps audience/staff members from hearing the proceedings.
3. Treating potential interviewees, and/or conducting interviews, in a belligerent manner.

B. Placement of video recording equipment/crew:

1. When recording is taking place in the Board Room, video cameras, tripods, and/or crew shall be located in the surrounding perimeter of the Board room and shall be situated so the public is able to safely walk around said perimeter without being impeded by such video cameras, tripods, and/or crew.
2. When recording is taking place a meeting of a legislative body herein defined at a location other than the Board room, video cameras, tripods, and/or crew shall be situated so neither the view or the circulation of the audience or staff is impeded.
3. All audio/electrical cords must be securely taped or covered with a mat.

C. AMBAG staff oversees enforcement the above guidelines at the meeting site.

AMBAG Policy No. 10

TECHNICAL DISRUPTION OF REMOTE PARTICIPATION - BOARD MEETING POLICY

To comply with recent legislative amendments enacted by Senate Bill 707, this policy establishes the procedure to be followed in the event of a disruption in two-way remote participation (including, but not limited to, Zoom) during a Board or Executive Committee meeting. In the event of such disruption, if the disruption prevents members of the public from remotely attending or observing the meeting, the AMBAG Board or Executive Committee shall recess for no less than one hour, during which time staff shall make good faith efforts to restore service. Following such efforts, the AMBAG Board or Executive Committee shall adopt, by roll-call vote, a formal finding affirming that reasonable efforts were made to resolve the disruption and that resuming the meeting serves the public interest more than further delaying the meeting to seek a resolution.

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MEMORANDUM

TO: AMBAG Board of Directors

FROM: Maura F. Twomey, Executive Director

SUBJECT: Revised Procurement Policies and Procedures Manual

MEETING DATE: October 9, 2026

RECOMMENDATION:

Adopt the Revised Procurement Policies and Procedures.

BACKGROUND/DISCUSSION:

The draft Procurement Policies and Procedures Manual is attached for Board action at this meeting. The draft Procurement Policies and Procedures Manual was updated to reflect changes in required state and federal regulations and a change to the Executive Director contract approval delegation from \$25,000 to \$50,000. The change is consistent with delegations to other transportation agencies within the region and is requested due to the rising cost of goods and services that AMBAG must procure.

FINANCIAL IMPACT:

None.

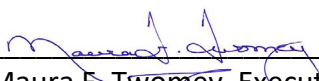
COORDINATION:

None.

ATTACHMENT:

1. Summary of 2026 Updates to 2022 Manual Procurement Manual
2. AMBAG's Draft Procurement Policies and Procedures Manual (separately enclosed)

APPROVED BY:


Maura F. Twomey, Executive Director

Planning Excellence!

Attachment 1

AMBAG

Procurement Policies and Procedures Manual

Summary of 2026 Updates to 2022 Manual Procurement Manual

Section	Section Title	Description of Update
006	Contract Approval Delegations Development and Administration	Contract Approval Delegation for Executive Director increased from \$25,000 to \$50,000, consistent with delegations to other transportation agencies within the region.
019B	Advertising of Solicitations	Clarified requirements and options for advertising solicitations to ensure competitive procurements.
019C	Geographic Preferences	Reflects change in federal regulations that currently allow for the use of statutory or administratively imposed in-state or local geographic preferences in the evaluation of bids/proposals if federal funds will be used.
023A	Procurement by Micro-purchase	Previous threshold of \$10,000 raised to \$15,000 per change in federal regulations.
034	Disadvantage Business Enterprises and Equal Opportunity	Due to the uncertainty of federal requirements regarding these programs, the Policy Manual was updated to direct manual users to Chapter 10 of the Caltrans Local Assistance Manual for current forms and requirements.
Appendices	Appendices 14	Due to the uncertainty of federal requirements regarding these programs, the Policy Manual was updated to direct manual users to Chapter 10 of the Caltrans Local Assistance Manual for current forms and requirements.
Appendices	Appendices 38 and 39 were combined into a "Non-Architecture and Engineering Procurement checklist.	New appendix provides a comprehensive checklist, including necessary actions, to comply with state and federal procurement requirements.



MEMORANDUM

TO: AMBAG Board of Directors

FROM: Maura F. Twomey, Executive Director

RECOMMENDED BY: Jessic Agee, Director of Finance and Administration

SUBJECT: Authorized Check Signers for RCPWG Bank Account

MEETING DATE: October 14, 2026

RECOMMENDATION:

Staff recommends that the Board of Directors approve the individuals with check signing authority for the Monterey Bay Area Regional Climate Project Working Group (RCPWG) bank account.

BACKGROUND/ DISCUSSION:

AMBAG requires two signatures on all bank drafts.

AMBAG entered into an MOU with the RCPWG to serve as the fiscal sponsor for the group as of July 2026. AMBAG will create a new bank account to properly segregate and account for RCPWG funds.

AMBAG proposes the following individuals be authorized as check signers for the RCPWG bank account:

Board Signers – President Brian McCarthy and 1st Vice President Mindy Sotelo.

Staff Signers - Maura Twomey, Bhupendra Patel, Heather Adamson, and Amaury Berteaud.

ALTERNATIVES:

The Board could recommend a different slate of signers for the RCPWG account.

FINANCIAL IMPACT:

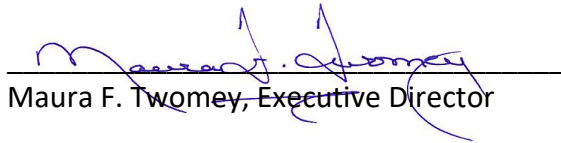
There is no financial impact from this action.

COORDINATION:

Staff will coordinate with Mechanics Bank to authorize the selected individuals as signers on the RCPWG bank account.

ATTACHMENT:

1. Letter to Mechanics Bank

APPROVED BY:

Maura F. Twomey, Executive Director



September 30, 2026

Attachment 1

Mechanics Bank

Seaside Branch
1658 Fremont Blvd
Seaside, CA 93955

Subject: Request to Open New Deposit Account

To Whom It May Concern:

The Association of Monterey Bay Area Governments (AMBAG) is the fiscal sponsor for the Regional Climate Project Working Group (RCPWG). RCPWG does not have its own TIN. AMBAG's Federal Tax Identification Number (EIN) is: 94-1742840. We are requesting the opening of a new deposit account with Mechanics Bank for RCPWG.

The following individuals are authorized signers for the deposit account and are authorized to be included in the banking resolution and account documentation:

- Maura Twomey, Executive Director
- Amaury Berteaud, Director of Sustainability Programs
- Bhupendra Patel, Director of Modeling
- Heather Adamson, Director of Planning
- Brian McCarthy, President
- Mindy Sotelo, 1st Vice President

Please prepare the necessary account opening documents, signature cards, and banking resolution for our review and execution. We will also require checks, deposit tickets, and an endorsement stamp.

Should you require any additional information or documentation, please contact me at (831) 264-5099 or jagee@ambag.org.

Thank you for your assistance.

Sincerely,

Jessica Agee

Director of Finance and Administration
Association of Monterey Bay Area Governments (AMBAG)

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MEMORANDUM

TO: AMBAG Board of Directors

FROM: Maura F. Twomey, Executive Director

RECOMMENDED BY: Jessica Agee, Director of Finance and Administration

SUBJECT: Financial Update Report

MEETING DATE: October 14, 2026

RECOMMENDATION:

Staff recommends that the Board of Directors receive the Financial Update Report.

BACKGROUND/ DISCUSSION:

The enclosed financial reports are for the 2026-2027 Fiscal Year (FY) and are presented as a consent item. The attached reports contain the cumulative effect of operations through July 31, 2026, as well as a budget-to-actual comparison. Amounts in the Financial Update Report are unaudited.

FINANCIAL IMPACT:

The Balance Sheet for July 31, 2026, reflects a cash balance of \$1,577,752.66. The accounts receivable balance is \$804,483.18, while the current liabilities balance is \$307,535.66. AMBAG has sufficient current assets on hand to pay all known current obligations.

AMBAG's Balance Sheet as of July 31, 2026, reflects a positive Net Position in the amount of \$610,916.18. This is due in part to the Profit and Loss Statement reflecting an excess of revenue over expense of \$223,732.88. Changes in Net Position are to be expected throughout the fiscal year (FY), particularly at the beginning due to the collection of member dues which are received in July and the timing of various year-end adjustments required after our financial audit.

Planning Excellence!

The following table highlights key Budget to Actual financial data:

Budget to Actual Financial Highlights
For Period July 1, 2026 through July 31, 2026

Expenditures	Budget Through July 2026	Actual Through July 2026	Difference
Salaries & Fringe Benefits	\$ 333,108.00	\$ 267,843.09	\$ 65,264.91
Professional Services	\$ 279,720.00	\$ 52,796.61	\$ 226,923.39
Lease/Rentals	\$ 6,625.00	\$ 6,502.61	\$ 122.39
Communications	\$ 2,067.00	\$ 1,619.57	\$ 447.43
Supplies	\$ 17,688.00	\$ 4,153.03	\$ 13,534.97
Printing	\$ 583.00	\$ 897.42	\$ (314.42)
Travel	\$ 9,179.00	\$ 2,954.11	\$ 6,224.89
Other Charges	\$ 12,842.00	\$ 15,646.56	\$ (2,804.56)
Non-Federal Local Match	\$ 23,907.68	\$ 23,907.68	\$ -
Total	\$ 661,811.00	\$ 376,320.68	\$ 309,399.00
Revenue			
Federal/State/Local Revenue	\$ 688,551.00	\$ 600,053.56	\$ 88,497.44
Note: AMBAG is projecting a surplus, therefore budgeted revenues do not equal expenses.			

Revenues/Expenses (Budget to Actual Comparison):

The budget reflects a linear programming of funds while actual work is contingent on various factors. Therefore, during the fiscal year there will be fluctuations from budget-to-actual.

Professional Services are under budget primarily due to the timing of work on projects performed by contractors. Projects early in their implementation are Pajaro Bridge Infrastructure Resilient Design Study (Pajaro BIRDS) and Central Coast Rural Regional Energy Network (Rural REN). This work is not performed in a linear fashion while the budget reflects linear programming.

Since AMBAG funding is primarily on a reimbursement basis, any deviation in expenditure also results in a corresponding deviation in revenue. Budget-to-actual revenue and expenditures are monitored regularly to analyze fiscal operations and propose amendments to the budget if needed.

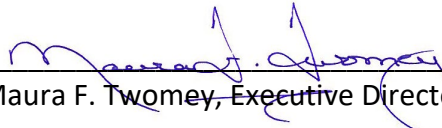
COORDINATION:

N/A

ATTACHMENTS:

1. Balance Sheet as of July 31, 2026
2. Profit and Loss: July 1, 2026 – July 31, 2026
3. Cash Activity for August 2026

APPROVED BY:



Maura F. Twomey, Executive Director

AMBAG

Balance Sheet - Attachment 1

As of July 31, 2026

	July 31, 2026	Liabilities & Net Position	July 31, 2026
Assets		Liabilities	
Current Assets		Current Liabilities	
Cash and Cash Equivalents		Accounts Payable	151,395.34
Mechanics Bank - Special Reserve	1,032,535.79	Employee Benefits	156,140.32
Mechanics Bank - Checking	274,669.47	Mechanics Bank - Line of Credit	0.00
Mechanics Bank - REAP 2.0 Checking	265,752.10	Total Current Liabilities	307,535.66
Petty Cash	500.00		
LAIF Account	4,295.30		
Total Cash and Cash Equivalents	1,577,752.66	Long-Term Liabilities	
Accounts Receivable		Deferred Inflows - Actuarial	258,986.95
Accounts Receivable	804,483.18	Net Pension Liability (GASB 68)	1,888,153.69
Total Accounts Receivable	804,483.18	OPEB Liability	6,767.74
Other Current Assets		Deferred Revenue	347,173.51
Due from PRWFPA/RAPS	150.38	Total Long-Term Liabilities	2,501,081.89
Prepaid Items	48,157.18		
Total Other Current Assets	48,307.56	Total Liabilities	2,808,617.55
Total Current Assets	2,430,543.40		
Long-Term Assets		Net Position	
Net OPEB Asset	96,473.00	Beginning Net Position	387,183.30
Deferred Outflows - Actuarial	533,833.49	Net Income/(Loss)	223,732.88
Deferred Outflows - PERS Contribution	272,963.59	Total Ending Net Position	610,916.18
Total Long-Term Assets	903,270.08	Total Liabilities & Net Position	3,419,533.73
Capital Assets			
Capital Assets	439,462.41		
Accumulated Depreciation	(353,742.16)		
Total Capital Assets	85,720.25		
Total Assets	3,419,533.73		

AMBAG
Profit & Loss - Attachment 2
July 2026

	July-26	July-26
Income		
AMBAG Revenue		216,747.45
Cash Contributions		753.83
Grant Revenue		358,644.60
Non-Federal Local Match		23,907.68
Total Income		600,053.56
Expense		
Salaries		156,512.91
Fringe Benefits		111,330.18
Professional Services		52,796.61
Lease/Rentals		6,502.61
Communications		1,619.57
Supplies		4,153.03
Printing		897.42
Travel		2,954.11
Other Charges:		
BOD Allowances		
BOD Refreshments/Travel/Nameplates/Dinner/Other Workshops/Training		
CCR REN Travel/Classes/Events/Recruitment/Other	250.00	
SB1/MTIP/MTP/SCS/OWP/Public Participation Expenses	952.89	
Dues & Subscriptions	7,810.00	
Depreciation Expense	3,465.74	
Insurance	3,167.93	
Interest/Fees/Tax Expense	0.00	
Total Other Charges		15,646.56
Non-Federal Local Match		23,907.68
Total Expense		376,320.68
Net Income/(Loss)		223,732.88

AMBAG
Cash Activity - Attachment 3
For August 2026

Monthly Cash Activity	July-26	August-26	September-26	October-26	November-26	December-26	January-27	February-27	March-27	April-27	May-27	June-27	TOTAL
1. CASH ON HAND													
[Beginning of month]	2,077,982.83	1,577,752.66	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
2. CASH RECEIPTS													
(a) AMBAG Revenue	193,066.29	96,999.45	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	290,065.74
(b) Grant Revenue	444,103.96	294,971.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	739,074.96
(c) REAP Advance Payment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
(d) Borrowing	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
3. TOTAL CASH RECEIPTS	637,170.25	391,970.45	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,029,140.70
4. TOTAL CASH AVAILABLE	2,715,153.08	1,969,723.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
5. CASH PAID OUT													
(a) Payroll & Related	328,439.20	244,905.78	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	573,344.98
(b) Professional Services	757,310.02	144,476.69	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	901,786.71
(c) Capital Outlay	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
(d) Lease/Rentals	12,483.74	6,502.61	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	18,986.35
(e) Communications	1,986.58	1,119.92	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3,106.50
(f) Supplies	3,830.92	18,090.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	21,921.04
(g) Printing	0.00	897.42	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	897.42
(h) Travel	10,091.16	1,724.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11,816.01
(i) Other Charges	23,258.80	9,914.98	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	33,173.78
(j) Loan Repayment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6. TOTAL CASH PAID OUT	1,137,400.42	427,632.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,565,032.79
7. CASH POSITION	1,577,752.66	1,542,090.74	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	



MEMORANDUM

TO: AMBAG Board of Directors

FROM: Maura F. Twomey, Executive Director

RECOMMENDED BY: Amaury Berteaud, Sustainability Program Manager

SUBJECT: Monterey Bay Electric Vehicle Climate Adaptation and Resiliency Framework – Draft Roadmap

MEETING DATE: October 14, 2026

RECOMMENDATION:

Receive a presentation on the Monterey Bay Electric Vehicle Climate Adaptation and Resiliency Framework Draft Roadmap.

BACKGROUND/DISCUSSION:

On August 31, 2023, the California Department of Transportation awarded AMBAG and Ecology Action a \$750,000 Sustainable Transportation Planning Grant (STPG) climate adaptation planning grant to fund the creation of a Monterey Bay Electric Vehicle Climate Adaptation and Resiliency Framework.

AMBAG staff procured Rincon Consultants to act as the technical consultant for this effort. Rincon first analyzed existing charging infrastructure in the region and anticipated charging needs in 2030 and 2045 based on projected EV adoption rates from the California Energy Commission. While the Monterey Bay region currently has approximately 1,000 publicly available chargers, the projected need is approximately 5,000 by 2030 and 18,000 by 2045. This analysis also documented that the current distribution of charging infrastructure is unevenly distributed throughout the region, with more infrastructure and EV adoption in coastal and affluent communities. The technical consultant team also released an online mapping-based tool called Padlet to gather feedback from the community on existing EV infrastructure locations and desired future location. This tool was widely shared through social media channels, a Monterey Herald article, and city newsletters. The Padlet tool received over 350 comments on

existing charger locations and more than 280 suggestions for new charger locations. Feedback was concentrated in areas with higher EV infrastructure and adoption density.

In parallel to the technical analysis, AMBAG and Ecology Action engaged Regeneración Pajaro Valley, a Community Based Organization, as an Education and Outreach Consultant. AMBAG, Ecology Action, and Regeneración designed a bilingual survey on transportation needs, including in conditions of extreme weather, and EV knowledge, in order to gather input from disadvantaged and underserved communities with lower EV adoption rates. This effort gathered over 750 answers, 75% of which were collected in Spanish and Mixteco. The responses revealed relatively low levels of familiarity with EVs, but a deep understanding of how extreme weather events affect the region, and the transportation opportunities and barriers underserved communities face. Ecology Action used the survey to create a Vulnerability and Barriers Assessment Report, highlighting the transportation needs and barriers of underserved communities and recommendations on engaging these communities on EV adoption topics.

As both community engagement efforts were underway, the technical consultant team conducted a robust vulnerability assessment of existing infrastructure as well as an analysis of project grid capacity, stress based on projected adoption levels. The risk of power outages due to extreme weather events and Public Safety Power Shutoff was identified as the critical reliability risk for EV charging infrastructure. In terms of infrastructure buildout, the availability of headroom on electric feeders was identified as the key risk. Without capacity on distribution circuits, so called feeders, EV charging infrastructure risks delays while costly improvements, such as transformer upgrades are made. The need to upgrade infrastructure on a large scale also creates potentially significant affordability concerns.

Upon completion of the technical analysis, AMBAG staff hosted a public workshop to gather public input on the vulnerability analysis and ongoing community engagement efforts. The goal of this workshop was to inform stakeholders about the initial findings and gather ideas for potential strategies to address barriers, as well as foster a more equitable distribution of chargers. Based on the workshop and the community engagement, the team then developed an Equity framework for this project and recommended strategies. Each strategy includes a summary description, recommended implementation steps, key actors, and key considerations, and are intended to reflect both opportunities that partners are actively pursuing and that have the opportunity to be scaled, as well as proposed future activities. The draft twelve EV CAR Strategies are:

1. Install Renewable Energy and Battery Storage at Priority Charging Sites
2. Enhance Community and Grid Resilience Through Bidirectional Charging
3. Preserve Grid Capacity Through Smart Charging and Load Management
4. Develop Installation Tools and Guidelines for Public-Benefit Sites
5. Create Accessible, User-Centered EV Infrastructure Design and Service Delivery
6. Address Charging Needs at Multi-Family Housing

7. Address Charging Needs at Rural and Agricultural Community- Serving Properties
8. Co-locate EV Charging at Mobility Hubs and Resiliency Centers
9. Design and Deploy Shared EV Mobility Options
10. Facilitate Regional Collaborative Planning and Implementation to Advance Equitable Climate-Resilient EV Infrastructure
11. Direct Funding and Incentives Towards Underserved Communities
12. Sustain Local EV Awareness Campaigns that Advance EV Adoption with Local Partners

AMBAG is seeking input from community members, site owners, EV charging infrastructure operators, nonprofit partners, and public agencies on whether the strategies are appropriate and whether they contain enough material in order for stakeholders to understand what their role could be. Upon completion of the public comment period, AMBAG staff will work with the technical consultant team to finalize the framework. AMBAG will continue to work with partners to identify opportunities to expand EV charging infrastructure in the region.

ALTERNATIVES:

None.

FINANCIAL IMPACT:

The funding to conduct the work is budgeted in the FY 2026/2027 OWP and Budget.

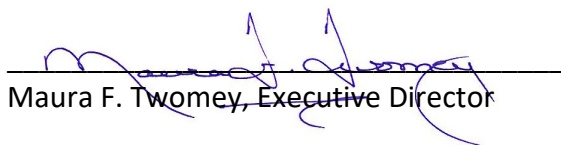
COORDINATION:

Staff is coordinating with stakeholders in order to gather input on the draft study, including jurisdictions, transportation partners, Community based organizations, power providers, and EV infrastructure operators.

ATTACHMENTS:

1. Draft Monterey Electric Vehicle Climate Adaptation and Resiliency Roadmap
2. Draft Appendix A: Monterey Bay Area Electric Vehicle Climate Adaptation and Resiliency Strategies

APPROVED BY:


Maura F. Twomey, Executive Director



Attachment 1

ASSOCIATION OF MONTEREY BAY AREA GOVERNMENTS



Monterey Bay Electric Vehicle Climate Adaptation and Resilience Roadmap

September 2026

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Acknowledgments

The Monterey Bay Electric Vehicle Climate Adaptation and Resilience Framework (EV CAR Framework) and Roadmap is the result of a collaboration between the Association of Monterey Bay Area Governments (AMBAG), community-based organizations, technical experts, and community members. AMBAG extends its gratitude to every organization and individual that contributed time, knowledge, and dedication to this regional effort.

This Monterey Bay EV CAR project created an opportunity to fill a critical gap in climate vulnerability analysis with respect to EV charging and to envision the role that the EV charging network can play in enhancing regional resilience.

AMBAG also acknowledges the important contributions of Ecology Action and Regeneración - Pajaro Valley Climate Action which played a critical role in designing and conducting inclusive and culturally sensitive community engagement throughout the project and making sure the adaptation strategies were responsive to community priorities. The Advisory Committee, consisting of cities, community organizations, regional transportation and planning agencies, state agencies, academic institutions, and subject matter experts, played an invaluable role in providing their insights and expertise to make the project a success.

Legal Disclaimer

This report was prepared as an account of work sponsored by an agency of the United States Government. Neither the United States Government nor any agency thereof, nor any of their employees, makes any warranty, express or implied, or assumes any legal liability or responsibility for the accuracy, completeness, or usefulness of any information, apparatus, product, or process disclosed, or represents that its use would not infringe privately owned rights. Reference herein to any specific commercial product, process, or service by trade name, trademark, manufacturer, or otherwise does not necessarily constitute or imply its endorsement, recommendation, or favoring by the United States Government or any agency thereof. The views and opinions of authors expressed herein do not necessarily state or reflect those of the United States Government or any agency thereof.

Artificial Intelligence Disclaimer

Generative artificial intelligence tools were used to assist with editing and synthesis tasks during preparation of the Framework Report and Roadmap. All content was reviewed, revised, and validated by the project team using project data, technical analyses, community engagement findings, and professional judgment.

Grant Funders

This report is based upon work supported by the California Department of Transportation, under a Fiscal year 2023/2024 Climate Adaptation Planning Sustainable transportation Planning Grant and by the Joint Office of Energy and Transportation through the U.S. Department of Energy's Office of Energy Efficiency and Renewable Energy (EERE) under Award Number DE-EE0011239.

Advisory Committee

- Jonathan Moore – City of Salinas
- Ambur Cameron – City of Hollister
- Beth Rocha – City of Seaside
- Erika Senyk – City of Capitola
- Beatriz Trujillo – City of Soledad
- Tatiana Brennan – County of Santa Cruz
- Luna Harter – County of Santa Cruz
- Kristine Conley – County of Santa Cruz
- Michael Hettenhausen – County of Santa Cruz
- Cora Panturad – County of Monterey
- Celina Stotler – County of San Benito
- Samuel Borick – San Benito Council of Governance
- David Frisbey – Monterey Bay Air Resources District
- Orchid Monroy-Ochoa – Caltrans
- Alex Yasbek – University of California, Santa Cruz
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- Raju Ceerla – California State University Monterey Bay
- Nancy Faulstich – Regeneración - Pajaro Valley Climate Action
- Maria Perez – Regeneración - Pajaro Valley Climate Action
- Pete Christensen – Breathe California
- Brian Foucht – EMC Planning Group
- Christina Watson – Transportation Agency for Monterey County

Project Team

- **Association of Monterey Bay Area Governments (AMBAG):**
 - o Amaury Berteaud, Director of Sustainability Programs
- **Ecology Action:**
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 - o Ahtziri Carranza, Program Specialist
 - o Gino Garcia, Senior Program Specialist
 - o Chloe Ortiz, Program Coordinator
 - o Cindy Aguilar-Castaneda, Program Specialist
 - o Shelby Cramton, Senior Planner
 - o Andrew Hoeksema, Vice President of Community Programs
 - o Kalia Vaught, EV Senior Program Specialist



Community-Based Organization Equity and Outreach Consultant Team

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 - o Maria Perez, Community Outreach Manager
 - o Jissel Antonio, Community Outreach and Program Assistant
- **Proyecto Mixteco Interpretation Services**
 - o Guillermina Rivera, Executive Director

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 - o Alexandra Haag, Transportation Engineer/Planner
- **Farallon Strategies, LLC**
 - o Michael McCormick, President & Founder
 - o Julia Kim, Partnerships Lead
 - o Prati Rosen, Senior Project Associate

1 Project Background

1.1 Project Purpose

Electric vehicle (EV) adoption is growing across California and the Monterey Bay region, creating an important opportunity to reduce greenhouse gas emissions, lower dependence on fossil fuels, and expand access to cleaner transportation. The shift to EVs requires new charging infrastructure, sufficient grid capacity, and careful planning to ensure that charging remains reliable during power outages, extreme weather, wildfire conditions, and other climate-related disruptions. Without proactive public investment and coordination, EV infrastructure and adoption are likely to remain concentrated in wealthier and more urban communities, leaving underserved residents with fewer options. Advanced planning for EV infrastructure also presents opportunities to accelerate alternative transportation modes in the region, such as shared mobility, and build a resilient future for all community members.

The Monterey Bay region includes the Counties of Monterey, Santa Cruz, and San Benito with an overall population of 774,000 people.

The Monterey Bay EV Climate Adaptation and Resilience (EV CAR) Framework and this companion Roadmap is intended to help AMBAG and its partners plan for an EV charging network that is equitable and resilient across the region. Equity is central to the Roadmaps recommendations to ensure all residents can access the benefits of EV adoption, including lower fuel and maintenance costs, cleaner air, and access to reliable transportation. For underserved communities, advancing equitable EV infrastructure is not only about adding chargers; it includes ensuring that charging locations, pricing, design, information, and reliability respond to the realities of people who have unmet mobility needs.

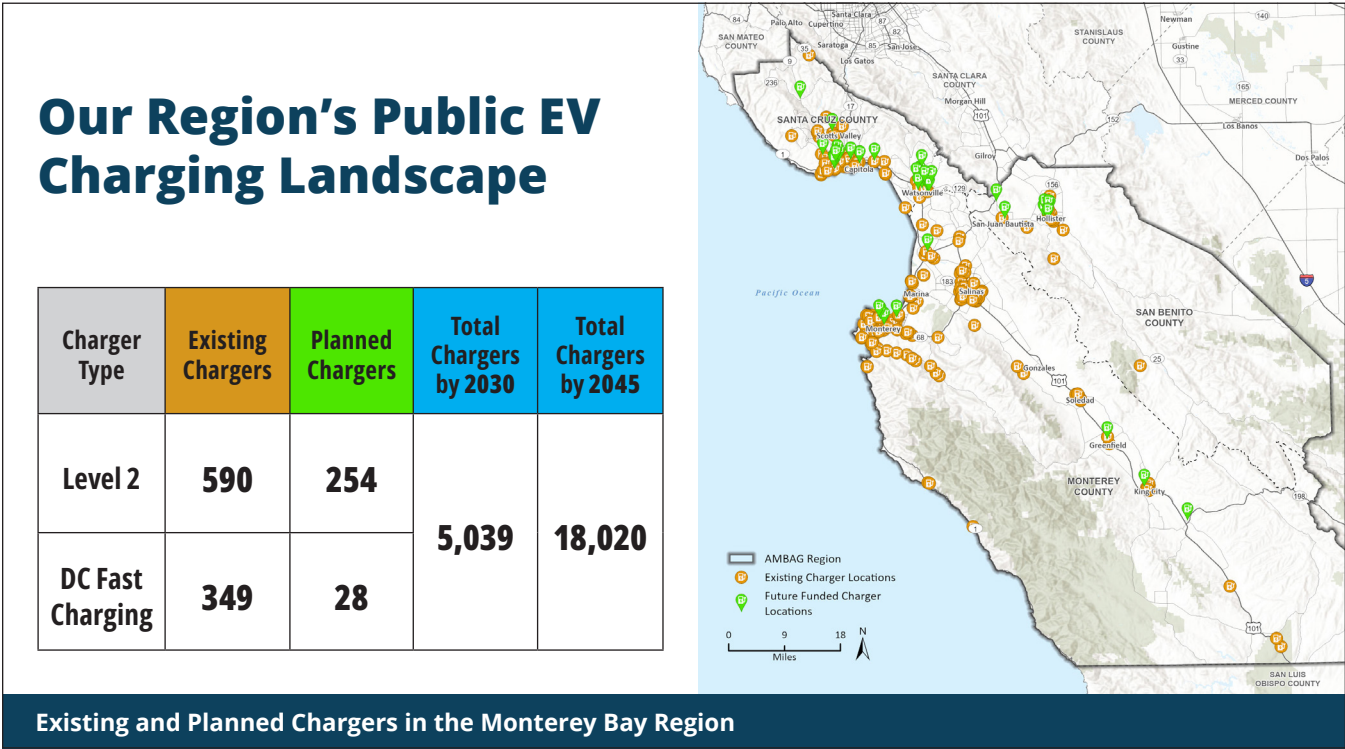
Both technical analyses and community engagement form the basis of the twelve strategies presented in the Roadmap. These strategies are designed to help AMBAG, local jurisdictions, utilities, community-based organizations, landowners, EV infrastructure providers, and other partners coordinate investments, prioritize underserved communities, strengthen charging reliability, and align EV infrastructure deployment with broader climate resilience and transportation goals. By linking infrastructure planning with affordability, community priorities, resilience, and safety, the Roadmap provides a practical guide for building a cleaner, more reliable, and more accessible regional charging network.

This Roadmap is intended to serve as an implementation-focused companion to the EV CAR Framework; readers are encouraged to refer to the Framework for a more detailed discussion of the analyses, stakeholder input, and rationale underlying the strategies presented here.

1.2 EV Charging Growth Projections

The AMBAG project and technical consultant team conducted an analysis to understand what future charging infrastructure may be needed across the Monterey Bay region. The team studied current EV ownership patterns, driving behavior, and differences between EV and internal combustion engine vehicle use, and then modeled EV growth through 2050. The results of the analysis shows that current EV travel is concentrated in urban areas and corridors where charging is already more available, while many rural, agricultural, and underserved areas continue to have limited charging access. This pattern suggests that charging availability is shaping where EVs are used today and that infrastructure gaps may be limiting broader adoption, especially for residents without reliable home charging or convenient public charging options.

Currently, there are over 1,000 existing and planned chargers in the Monterey Bay region. Looking ahead, the region is expected to need substantial new charging infrastructure to support EV growth. By 2030, the Monterey Bay region is projected to need 5,000 additional public chargers and nearly 35,000 new home chargers. By 2045, projected demand increases to 18,000 additional public chargers and more than 111,000 additional residential chargers. Growth is projected to be concentrated along major corridors such as Highway 101, in urban centers, and in emerging communities including southern San Benito County, Hollister, Watsonville, Scotts Valley, Monterey, King City, and areas east of Monterey. These findings underscore the need for coordinated planning that prepares for rapid growth while correcting existing gaps so future EV infrastructure supports both regional mobility and equitable access.



Existing and Planned Chargers in the Monterey Bay Region

1.3 Challenges and Opportunities

By advancing and facilitating EV infrastructure deployment, AMBAG and its partners have the opportunity to enhance equity and resilience in the Monterey Bay region. Climate resilience must become a core part of EV infrastructure planning because extreme heat, wildfire, flooding, storms, PSPS events¹, and grid stress can affect not only individual charging stations, but also the electrical distribution system, access roads, evacuation routes, and the broader transportation network. At the same time, continued EV growth will increase electricity demand, shift when electricity is being used, and require closer coordination among transportation agencies, utilities, local jurisdictions, landowners, community-based organizations, and EV infrastructure providers. These challenges create a unique opportunity to plan charging investments more strategically, using resilience-oriented siting, backup power, managed charging, battery storage, microgrids, and bidirectional charging to not only meet the needs of increased EV adoption with a more robust charging network but to also strengthen the grid itself.

1 A planned, temporary power outage initiated by an electric utility to reduce wildfire risk when weather and environmental conditions make energized power lines more likely to spark a fire.

Equity is also a central challenge and opportunity. Existing charging access is uneven across urban and rural communities; higher- and lower-income households, homeowners and renters, and communities already benefiting from EV investment compared to those that remain underserved. If future infrastructure is unreliable, unaffordable, poorly located, or difficult to use, it could reinforce existing transportation inequities and weaken public confidence in EVs. However, public agencies and partners can use this moment and the EV CAR Roadmap and Framework to guide investment where the private market may not provide sufficient service, target chargers and supportive programs toward residents facing the greatest barriers, and pair infrastructure deployment with culturally relevant outreach, multilingual communication, incentives, and community engagement. Done well, EV infrastructure planning can improve adoption, reduce household transportation costs, expand mobility options, and strengthen community resilience.

1.4 Community Needs and Priorities

Robust community outreach was conducted by Ecology Action with support from Regeneración Pajaro Valley and Proyecto Mixteco to identify transportation barriers, climate vulnerabilities, and EV adoption priorities across underserved communities in Santa Cruz, San Benito, and Monterey Counties. The engagement process emphasized trust-building, community-centered survey development, in-person outreach, and data collection with low-income residents, agricultural workers, undocumented individuals, and Spanish- and Mixteco-speaking community members. Feedback showed that many residents rely on personal vehicles while also facing affordability, infrastructure, and safety challenges; those who use public transit or walking as alternatives raised concerns about reliability, accessibility, and personal safety, especially during extreme weather or emergency conditions.

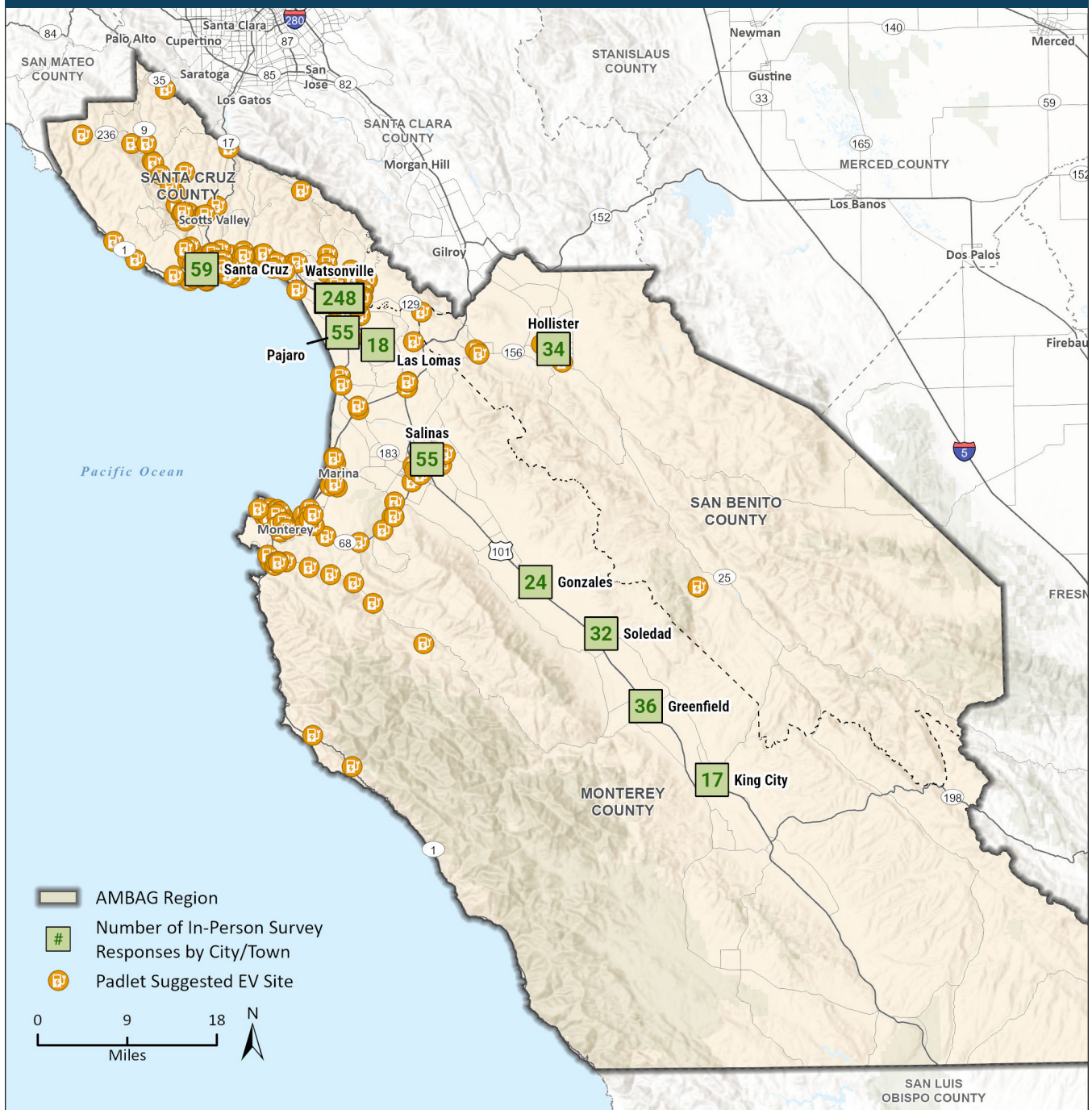
Community members expressed interest in EVs as part of a cleaner and more resilient transportation future, but significant barriers remain. Cost, limited charging access, lack of home charging for renters and multi-family housing residents, and limited information about EV technology all constrain adoption. Participants raised concerns about climate hazards such as flooding, extreme heat, wildfire, power outages, and evacuation challenges, particularly for residents without reliable vehicle access or air conditioning. These findings underscore the need for EV investments that are paired with education, multilingual and culturally relevant outreach, reliable and accessible charging locations, and a broader investment in transportation resilience strategies.

The AMBAG project and consultant team also conducted a regionwide effort to gather public input, using an interactive, map-based public engagement digital tool called Padlet, on existing, planned, and potential EV charging locations across the Monterey Bay region. It allowed community members to review the existing and planned EV charging network and provide location-specific feedback to help inform future investments. The most frequently cited concerns with existing chargers included broken or unreliable equipment, insufficient charging capacity at high-demand locations, and a lack of basic amenities, while charging. Participants broadly supported planned EV charging sites and expressed the most interest in proposing new EV charging locations. Overall, suggested sites clustered in higher-density areas and popular tourist destinations.

Geographic Diversity Represented in Community Feedback

Community engagement on the EV CAR Roadmap reflected a broad spectrum of input within the Monterey Bay region. In-person surveys gathered feedback from community members living in Watsonville, Santa Cruz, Pajaro, Salinas, Greenfield, Hollister, Soledad, Gonzales, and Las Lomas. Based on the

proposed suggested EV sites provided via the online Padlet survey, respondents reflected a preference for Santa Cruz, Monterey, Pacific Grove, Salinas, and Watsonville areas. The combination of both engagement strategies offered insights from a broad representation of community in the region.



1.5 Climate Change Vulnerability

In the coming years, the region is expected to experience rising temperatures, more frequent and prolonged heat waves, wildfire risk, extreme precipitation, flooding, landslides, and coastal hazards. These hazards can disrupt the electrical distribution system, which is the part of the grid most directly connected to homes, businesses, and charging stations. As a result, EV charging may become unavailable during an outage even when the charger itself is not physically damaged.

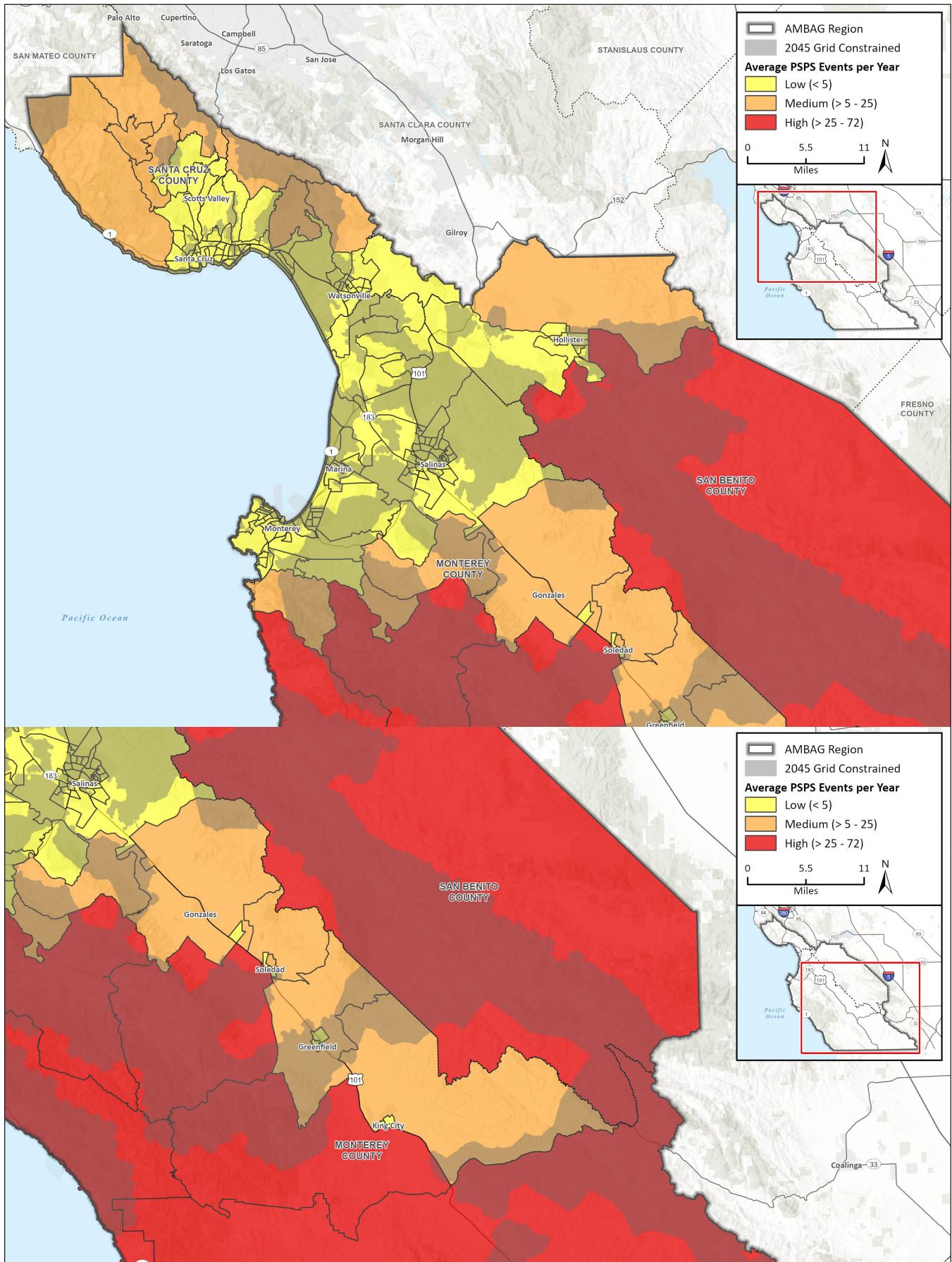
Wildfire-related conditions are the most significant climate-related threat to EV charging reliability because of their connection to grid outages and PSPS events. Climate modeling indicates that areas already prone to wildfire-related outages are likely to see increased exposure in the future, with some eastern and southwestern parts of the Monterey Bay region projected to experience roughly 40 additional PSPS-risk days per year under a mid-century global warming scenario. Hilly, forested, higher-elevation, and rural areas, are expected to experience the greatest increases in wildfire-related hazards and PSPS exposure. Many urbanized areas are projected to experience comparatively smaller changes in modeled PSPS conditions; however, they may still be affected when PG&E de-energizes parts of the grid that extend beyond the immediate high-risk area.

In addition to assessing where current EV infrastructure is located, future planning should consider where charging demand is expected to grow, where the grid is most vulnerable to climate-related outages, and where community members have the fewest transportation alternatives during emergencies. Pairing EV infrastructure deployment with resilience strategies and coordination with emergency planning can help ensure that the charging network remains reliable and accessible during climate-related disruptions.

Grid capacity and EV adoption analysis' identified areas where future charging demand may exceed available grid capacity, creating different types of planning challenges and opportunities, depending on the context. The figure below demonstrates the number of locations where grid limitations coincide with climate-related outage risk by 2045. In urban areas or locations with significant projected charger growth, grid upgrades, which are costly and time-intensive, may be more feasible because the cost can be spread across a larger number of users and greater electricity demand. In rural areas or locations with existing grid constraints, even a small number of chargers may strain the grid, and conventional upgrades may be less feasible. These areas will require targeted and creative solutions that also have notable resilience benefits such as distributed energy resources, smart chargers, managed charging, battery storage, or microgrids.

Building reliable EV charging infrastructure for the future will depend on how charging is sited and designed in relation to grid constraints, outage risks, travel corridors, and community needs. For AMBAG and its partners, the central planning insight is that charger deployment, grid readiness, climate resilience, and equity should be evaluated together rather than as separate considerations. Aligning these factors can help ensure that the region's EV charging network supports adoption goals while remaining reliable, accessible, and useful during climate-related disruptions.

2045 Risk Conditions



2 Approaches to Advance Resilient EV Deployment

2.1 Equity Guardrails Criteria

AMBAG is committed to expanding EV infrastructure through an equitable, community-driven approach. To support equitable outcomes in the EV CAR Roadmap, the project team developed the Equity Guardrails Criteria to evaluate strategies through an equity lens. Informed by community engagement, the guardrails help prioritize investments that benefit underserved communities and ensure EV infrastructure supports affordable access, emergency readiness, and long-term transportation resilience. The criteria also provide a consistent framework for incorporating community priorities into project planning and implementation.

Equity Guardrails

- | | |
|--|--|
| 1. Adopt a Fair and Transparent Process for EV Infrastructure Decision-making | 4. Prioritize EV Infrastructure Investments for Highest Need Communities |
| 2. Establish Pathways for Two-Way Communication and Engagement between Public Agencies and Communities | 5. Increase EV-related Knowledge in Underserved Communities |
| 3. Provide Fair, Safe, and Inclusive Access to EV Infrastructure | 6. Provide Affordable and Equitable Access to EV Infrastructure |

2.2 Adaptation Strategy Framework

Twelve adaptation strategies have been identified to provide a practical roadmap for strengthening the resilience and equity of the Monterey Bay region's EV charging network. The strategies are organized into four complementary categories:

1. **Energy Resilience**, which focuses on improving grid reliability and flexibility of during power outages
2. **Siting and Design**, which promotes resilient, accessible, and user-centered charging infrastructure
3. **Mobility**, which expands transportation options and integrates EV charging into the broader transportation network
4. **Collaboration, Funding, and Outreach**, which emphasizes regional coordination, equitable investment, and sustained community engagement

These strategies translate technical analyses and community-informed priorities into actionable approaches that AMBAG and its partners can pursue to build a more climate-resilient, reliable, and equitable EV charging system for the region. More detailed information about each strategy, along with implementation actions, is included in Appendix A.

EVCAR Framework Strategies

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01	Install Renewable Energy and Battery Storage at Priority Charging Sites	
02	Enhance Community and Grid Resilience Through Bidirectional Charging	
03	Preserve Grid Capacity Through Smart Charging and Load Management	
04	Develop Installation Tools and Guidelines for Public-Benefit Sites	
05	Create Accessible, User-Centered EV Infrastructure Design and Service Delivery	
06	Address Charging Needs at Multi-Family Housing	
07	Address Charging Needs at Rural and Agricultural Community-Serving Properties	
08	Co-locate EV Charging at Mobility Hubs and Resiliency Centers	
09	Design and Deploy Shared EV Mobility Options	
10	Facilitate Regional Collaborative Planning and Implementation to Advance Equitable Climate-Resilient EV Infrastructure	
11	Direct Funding and Incentives Towards Underserved Communities	
12	Sustain Local EV Awareness Campaigns that Advance EV Adoption with Local Partners	

2.3 Next Steps

Implementing the EV CAR Roadmap will require sustained coordination among AMBAG, local jurisdictions, utilities, community-based organizations, transportation agencies, property owners, and EV infrastructure providers. While the twelve strategies provide a long-term roadmap, several near-term actions can help build momentum and establish the foundation for equitable and resilient EV infrastructure deployment across the region.

The nearest-term actions include Strategies #8 and #9 from Appendix A, co-locating EV charging at resiliency centers and deploying shared EV mobility options, such as shared EV car-share, short-term rental, and vanpool services. These strategies are already underway with implementation partners actively seeking funding to deploy the strategies across the Monterey Bay region. Collaboration, funding, and outreach strategies (Strategies #10, #11, #12) are also near-term strategies that will be advanced through existing partnerships, community engagement efforts, and funding development. For these strategies, ongoing discussions among partners will continue while new opportunities for regional collaboration will be explored. The focus of these discussions will be to review priority geographies, track implementation needs, coordinate funding opportunities, discuss grid and permitting barriers, and identify where joint action could reduce costs or accelerate deployment.

Strategies #1 and #2, installing renewable energy and battery storage at priority charging sites and enhancing community and grid resilience through bidirectional charging, will be considered priorities as EV infrastructure grows across the region. These strategies are still in the conceptualization phase, and near-term steps will focus on identifying the partners, site types, operating models, and funding opportunities needed to move them from concept to implementable projects.

This Roadmap presents an important first step toward building a more equitable, resilient, and reliable EV charging network across the Monterey Bay region. The strategies presented here provide a practical foundation for coordinated action among public agencies, utilities, community organizations, and private-sector partners to ensure that EV infrastructure investments advance both climate resilience and transportation equity. As EV adoption accelerates and climate risks intensify, proactive planning and collaboration will be essential to ensure that all communities can benefit from a charging network that is reliable during disruptions, responsive to community needs, and aligned with the region's long-term sustainability goals. By acting now, the Monterey Bay region can position itself as a leader in advancing EV infrastructure that not only supports California's clean transportation goals, but also strengthens community resilience for decades to come.

Appendix A: Adaptation Strategies

1 Introduction to Adaptation Strategy Framework

1.1 Strategy Themes

Building on the analyses conducted as part of the Monterey Bay EV CAR project, twelve adaptation strategies have been identified to provide a practical roadmap for strengthening the resilience and equity of the Monterey Bay region's electric vehicle (EV) charging network. The strategies are organized into four complementary categories:

1. **Energy Resilience**, which focuses on improving the reliability and flexibility of the electrical system;
2. **Siting and Design**, which promotes resilient, accessible, and user-centered charging infrastructure;
3. **Mobility**, which expands transportation options and integrates EV charging into the broader transportation network; and
4. **Collaboration, Funding, and Outreach**, which emphasizes regional coordination, equitable investment, and sustained community engagement.

These strategies translate technical analyses and community-informed priorities into actionable approaches that the Association of Monterey Bay Area Governments (AMBAG) and its partners can pursue to build a more climate-resilient, reliable, and equitable EV charging system for the region. More detailed information about each strategy, along with implementation actions, is included below.

1.2 Key Considerations

The following key considerations apply across the adaptation strategies and are intended to guide how projects are prioritized, designed, funded, implemented, and maintained over time. These considerations evaluate resilience investments not just based on technical feasibility, but also on their ability to expand equitable access, support community-defined needs, reduce long-term operating risks, and deliver reliable benefits during everyday conditions and disruptive events, such as unexpected power outages. As AMBAG and its partners advance the twelve strategies below, these considerations should be used as a consistent lens for decision-making, coordination, site selection and design, and community engagement.

Equity

Equity considerations for siting and designing EV infrastructure should begin with the demographic analysis prepared for AMBAG's Metropolitan Transportation Plan/Sustainable Communities Strategy, followed by state established definitions associated with underserved communities, the Vulnerable Communities Platform, and the Healthy Places Index, while remaining open to other locally relevant tools and community-defined priorities. These data sources should be paired with funded

partnerships with community-based organizations (CBOs) to co-design and identify priority locations for deploying Roadmap adaptation strategies. Site selection should also reflect community-identified priorities, including locations near transit, community-serving destinations, resilience centers, affordable housing, and other places where charging can support both everyday mobility and emergency preparedness. Utilizing these data sources and partnerships to direct investments can help balance EV infrastructure investment across urban, rural, farmworker, and other underserved communities.

In general, EV infrastructure investments should prioritize locations and program designs that expand practical access for people who are least likely to have reliable home charging, including residents who rely on public charging, workers who need charging near employment centers or agricultural worksites, and households in areas with limited transportation options. Investments should be paired with clear, accessible information about how to locate, use, and pay for chargers so that new infrastructure is usable for first-time EV drivers, people with limited digital access, and residents who require information in languages other than English. Where charging sites also serve emergency or evacuation functions, backup-capable charging should be prioritized to help maintain access during unanticipated power outages and other disruptive events.

Climate vulnerability data and grid capacity analysis should be used together to identify communities where resilience challenges are most acute and where multiple barriers to EV access overlap. This includes places where exposure to extreme heat, wildfire, flooding, or power outages creates additional mobility and safety risks. Layering these datasets can help AMBAG and its partners distinguish between locations that are technically easy to serve and locations where investment would provide the greatest equity and resilience benefit. It can also help ensure that charging investments do not simply follow existing market demand, but instead address communities where infrastructure gaps, climate risks, and limited household resources compound one another.

Equitable Community Engagement

Community engagement should be integrated early and maintained throughout program design, site selection, and implementation so that priority sites reflect both technical resilience needs and community-defined priorities. Locations that would benefit most from increased grid resilience should be identified with community input and evaluated through the lens of the equity guardrails, rather than selected solely because sites are available or because existing market demand is strongest. Working with CBOs from the outset can help confirm priority needs, shape eligibility criteria, identify trusted outreach channels, and ensure that investments respond to the lived experiences of the residents, workers, and communities the strategies are intended to serve. Community engagement will be critical to understanding barriers to EV adoption among underserved communities so that AMBAG and implementing partners actively adjust the implementation of adaptation strategies to respond to ongoing needs among the community.

Costs and Funding

Costs and funding considerations should focus on directing investment toward sites where resilience benefits, charging demand, and potential demand-charge savings justify the upfront costs of deployment. Implementing partners should evaluate available programs at the time of project development and pursue the mix of grants, incentives, utility programs, and local or regional funding sources that best align with each project's purpose, site type, and equity objectives.

Candidate funding sources may include the Sustainable Communities Program, Clean Mobility Options, Sustainable Transportation Equity Project funding, the Self-Generation Incentive Program (SGIP), the California Electric Vehicle Infrastructure Project (CALeVIP 2.0)/Fast Charge California, Central Coast Community Energy (3CE) programs, California Energy Commission (CEC) solicitations, Caltrans planning or implementation grants, and other state and federal funding opportunities. Because program eligibility, timing, and funding availability can change, project teams should confirm current requirements before advancing site design, procurement, or implementation.

Operations and Maintenance

Operations and maintenance considerations should be addressed before projects launch so that EV infrastructure remains reliable, accessible, and useful after installation. Leasing or operating agreements should clearly identify the host, funder, operator, and maintenance owner, while also assigning responsibility for routine inspections, monitoring, emergency dispatch, repair timelines, customer support, payment system functionality, and data reporting, and long-term battery replacement or decommissioning. Regional coordination should therefore focus not only on charger installation, but also on the ongoing systems needed to maintain reliability, affordability, language access, and a positive user experience of EV charging infrastructure over time.

Program funding should also distinguish between one-time capital costs and the continuing subsidies or operating resources needed for staffing, maintenance, insurance, charging, customer service, and eventual equipment replacement. Before launch, implementing partners should identify the operating host and document responsibilities through a memorandum of understanding or similar agreement that defines the roles of operators, host sites, utilities, 3CE, CBOs, and other partners. Performance tracking should extend beyond installation counts to include enrollment, rides or trips served where applicable, priority users and trip purposes served, underserved households reached, vehicle uptime, charger uptime, and other measures that show whether the investment continues to deliver equitable and reliable service.

2 Adaptation Strategies

2.1 Adaptation Strategy #1: Install Renewable Energy and Battery Storage at Priority Charging Sites



Overview & Purpose

Pairing on-site solar and/or micro-wind generation with battery energy storage allows a charging site to store electricity and operate independently from the grid during an outage. Under normal conditions, the battery can also reduce peak demand and associated operating costs.¹

Fixed on-site power production-plus-storage systems provide the greatest value at sites with frequent outages, capacity-constrained feeders, critical facilities, or resilience centers. System size should reflect the site's charging demand, expected outage duration, available space, and required level of service. At rural, lower-demand sites, distributed energy systems may also reduce or defer utility upgrades.² Batteries, in particular, can reduce peak energy draw and reduce the need for new power lines or other upgrades by handling temporary spikes in electricity demand.³ Adding backup power to critical facilities (like at city halls) ensures continued operations during emergency events. Similarly, renewable energy and battery storage at resilience centers avoids power outage disruptions to sites serving community needs.

¹ NREL, *Ensuring Resilient Operations of Solar-Plus-Storage Community Resilience Hubs* (2024)

² Southern California Edison Microgrid Incentive Program (2023) accessed at: https://www.sce.com/sites/default/files/custom-files/PDF_Files/SCE_MIP_Handbook_Final_20231019.pdf

³ <https://www.eia.gov/todayinenergy/detail.php?id=34432>

Power outages due to extreme weather events and wildfire-driven Public Safety Power Shutoffs (PSPS) represent the region's greatest climate threat to the electrical grid that EV charging depends on.⁴ Priority charging sites therefore can increase their reliability through dependable sources of on-site electricity generation and storage that maintain essential service when the grid is unavailable.

To ensure both procedural and distributional equity, priority charging sites should be identified through ongoing engagement with public agencies, CBOs, and residents to provide fair, safe, and inclusive access to EV infrastructure during power outages and emergency events.

Implementation Actions

Implementation Actions	Implementing Partners
1.1. Identify priority charging sites for resilience upgrades that play a central role in a local jurisdiction's emergency response or overall community resilience. Consider likelihood of outages and associated risks and equity impacts.	AMBAG, Cities & Counties, Power Utility
1.2. Define roles for each site in enhancing resilience and emergency response and determine the generation and storage capacity required for continued site operability.	Cities & Counties, Transportation Partners, Power Utility
1.3. Coordinate early with Pacific Gas & Electric (PG&E) and permitting agencies on interconnection, battery fire-safety review, local approvals, maintenance responsibilities, and outage service restoration procedures.	Cities & Counties, Power Utility
1.4. Estimate the value of added resilience by avoiding costs associated with power outages and peak demand charges to compare to added infrastructure costs.	Cities & Counties, Transportation Partners, Power Utility

Benefits & Outcomes

- Maintains charging capability during power outages at facilities that play a central role during emergencies or in meeting community members' daily needs, particularly in areas with limited grid reliability.
- Improves the reliability of public charging investments by combining everyday operating benefits with emergency backup capability.
- Reduces peak-demand costs and may defer electrical distribution-system upgrades that would otherwise delay charger deployment.
- Extends viable charging to rural and grid-constrained communities.
- Advances regional climate goals while creating a foundation for future microgrid and vehicle-to-grid applications, including resilience centers and emergency-serving facilities (see Strategy #8).

⁴ Monterey Bay EV CAR Framework Vulnerability Assessment (2026). The vulnerability assessment estimates about 40 additional PSPS-risk days per year in some eastern and southwestern areas under the modeled 0.8°C-to-2.0°C comparison.

Key Considerations

- **System role and sizing:** Define whether each site will provide peak-demand management, limited emergency charging, or sustained islanded operation before selecting system capacity.
- **Site feasibility:** Confirm space, structural capacity, equipment access, solar or wind access, and code-required setbacks for solar canopies and battery systems.
- **Approvals and safety:** Begin PG&E interconnection, permitting, and battery fire-safety review early because these activities can control the project schedule.
- **Community engagement:** For the first several sites that include battery storage or similar resilience technologies, facilitate proactive outreach and engagement before and during deployment to explain applicable fire safety standards, equipment safeguards, emergency response coordination, monitoring and maintenance practices, and the benefits of backup power during outages. This early engagement should create opportunities for residents and CBOs to ask questions, identify site-specific concerns, and build familiarity with the technology as safeguards and performance become better understood.

2.2 Adaptation Strategy #2: Enhance Community and Grid Resilience Through Bidirectional Charging



Overview & Purpose

Bidirectional charging can help turn sites with grid reliability challenges into a key adaptation asset. This strategy addresses a core resilience and implementation gap identified in the EV CAR Framework by leveraging EVs to provide backup power to facilities in areas facing electricity reliability challenges. Bidirectional charging allows compatible EVs to send electricity back to a building, charger site, or the grid when needed. Current technologies exist for EV's as well as networked chargers to power entire homes or buildings during power outages depending on the need, and as bidirectional charging technologies become more widely available, EVs can serve as distributed energy resources that improve critical facility and community resilience during grid outages and other disruptive events. Bidirectional charging can also be used at the residential level where a single EV battery can run an entire single-family home for two days or more⁵, decreasing the impacts of unanticipated outages due to climate driven extreme weather events.

Bidirectional charging can be especially valuable in communities that experience frequent power outages or in homes that rely on electricity for medical or other critical devices, by providing households with an additional source of backup power during emergencies.

Furthermore, leveraging the battery within an existing EV is lower cost than deploying an additional home battery. These strategies can be enhanced by supporting on-site generation such as a solar array. Solar can be used to charge the EV, the EV can support the home during power outages, and smart charging approaches can limit overall grid strain, especially on larger systems with multiple chargers.

⁵ Based on an average electricity use of 29kWh per day (<https://www.eia.gov/energyexplained/use-of-energy/electricity-use-in-homes.php>) and an EV battery size of 60kWh (<https://www.hyundaiusa.com/us/en/vehicles/ioniq-5/compare-specs>)

Implementation Actions

Implementation Actions	Implementing Partners
2.1. Identify areas where bidirectional charging could provide the greatest resilience benefits during power outages and grid disruptions based on the EV CAR Framework technical analyses (e.g., overlay EV projected growth with PSPS events). Educate stakeholders on available technologies throughout the Monterey Bay region to help solve site specific challenges.	Cities & Counties, Power Utility, AMBAG, EV Infrastructure Providers, Transportation Partners
2.2. Develop site-specific bidirectional charging operating strategies based on site typology, grid constraints, and resilience needs. Consider setting EV discharge thresholds, charging times, and systems to power only critical infrastructure during outages to extend battery life.	EV Infrastructure Providers, Power Utilities, Cities & Counties
2.3. Coordinate early with PG&E and permitting agencies.	AMBAG, Cities & Counties, Power Utility
2.4. Pilot bidirectional charging at representative sites while evaluating system performance, maintenance needs, user experience, communications reliability, and operational costs.	EV Infrastructure Providers, AMBAG, Cities & Counties

Benefits & Outcomes

- Bidirectional charging can enhance resilience by providing electricity for homes in areas expected to experience unanticipated outages due to extreme weather events.
- Potential to increase cost effectiveness through “peak shaving” or avoiding the use of grid electricity during the most expensive parts of the day.
- Increases overall grid reliability and use of renewable electricity during peak hours.
- Creates a pathway for future vehicle-to-building or vehicle-to-grid applications that could support critical facilities, fleet depots, mobility hubs, or emergency-serving locations during constrained grid conditions.

Key Considerations

- **Maintaining Drivability:** EV discharge rules should include pre-defined thresholds under which EV's will no longer power buildings to ensure enough charge is left for transportation purposes, especially during extreme weather events, evacuations, emergency response, or other situations where mobility should be prioritized over electrical power.
- **Technology readiness and compatibility:** Bidirectional charging requires compatible vehicles, chargers, communications protocols, PG&E programs, and interconnection processes. Early pilots can help identify what is feasible today and what should be designed for future readiness.

2.3 Adaptation Strategy #3: Preserve Grid Capacity Through Smart Charging and Load Management



Overview & Purpose

New technologies, such as networked smart charging systems, can be deployed to address grid capacity challenges. These charging systems allow multiple EV chargers to scale individual electricity demand while smart switches can be used to switch between two appliances with similar electricity draw (an electric dryer and an individual Level 2 EV charger for example). Both strategies can significantly decrease grid demand and allow for charging in grid constrained areas by using existing capacity more efficiently.

Smart charging can reduce peak demand, improve utilization of existing electrical infrastructure, and help defer or avoid utility upgrades by actively managing electricity demand to avoid or even out peaks that overdraw grid resources. This will be an important benefit as feeder constraints are expected to become a growing risk by 2030 and 2050 without strategies that reduce or shift peak charging loads. Smart charging systems work best when multiple chargers are needed at a capacity constrained location. As more chargers are used, the system will lower charging speeds to allow more cars to charge at once. This technology can be especially valuable for level 2 systems installed in areas where cars are parked for longer periods including multifamily residences, offices and other worksites.

These systems use software, communications, and controls to manage when and how much electricity EV chargers draw from the grid. In addition to load management, these systems can also schedule charging around peak demand periods, balance loads across multiple chargers, participate in demand response programs, and integrate with on-site solar or battery storage. By actively managing when and how much electricity chargers use, smart chargers could reduce charging costs and help keep overall electricity bills lower for everyone.

On a smaller scale, smart switches can help a single-family home install an EV charger without a panel or service upgrade by sharing a circuit with an existing electric appliance like an electric stove or dryer since both systems use a dedicated 240v circuit. Some smart home EV chargers are beginning to integrate load management and solar and battery integration to further reduce charging costs and grid impacts.

Implementation Actions

Implementation Actions	Implementing Partners
3.1. Identify opportunities for level 2 smart charging for deployment to help manage peak demand load.	Cities & Counties, AMBAG, Power Utility, EV Infrastructure Providers
3.2. Define demand management objectives by site type.	AMBAG
3.3. Develop site-specific smart charging operating strategies based on site typology, grid constraints, and user charging behavior. Consider applications such as managed workplace charging, fleet charging optimization, and demand-managed multifamily charging.	EV Infrastructure Providers, Power Utilities, Cities & Counties
3.4. Coordinate early with PG&E and permitting agencies.	AMBAG, Cities & Counties, Power Utility
3.5. Encourage or require EV-ready electrical infrastructure and load management capabilities—including energy management systems, panel capacity planning, and communications infrastructure—to support smart charging in existing buildings undergoing major renovation or electrical upgrades.	Cities & Counties, AMBAG
3.6. Pilot smart charging at representative sites while evaluating system performance, maintenance needs, user experience, communications reliability, and operational costs.	EV Infrastructure Providers, AMBAG, Cities & Counties

Benefits & Outcomes

- Increases charging options by lowering peak electricity demand allowing more chargers to be installed at a single location. This means more people can charge at one time without needing to move vehicles or swap parking spots.
- Can lower installation and operating costs by lowering utility upgrade costs, reducing peak demand charges, and enabling participation in managed charging or demand response programs.

Key Considerations

- **Grid benefit versus user experience:** Enhance user understanding and accessibility by providing clear information on charging speed, timing, pricing, and any automated controls.
- **Site context matters:** Workplace, fleet, and multi-unit dwelling charging generally offer more flexibility for load management than corridor fast charging or emergency-serving sites where immediate access may be critical.

2.4 Adaptation Strategy #4: Develop Installation Tools and Guidelines for Public-Benefit Sites



Overview & Purpose

This strategy focuses on two implementation tools: (1) an EV charging best-practices siting checklist for public-benefit sites⁶ and (2) template leasing and licensing agreements that can streamline charger deployment. Residents of multi-family housing and underserved rural and agricultural communities have fewer convenient charging options and, therefore, lower EV adoption rates.⁷ Creating a standardized siting checklist that layers the location of areas with medium- or high- levels of residents without access to charging, grid capacity, and permitting constraints can help local agencies deliver equitable charging projects more quickly and with lower administrative burden.⁸ The siting checklist should also encourage sites to be tied to locations with everyday amenities, reliable charging infrastructure, and 24/7 access.

The lease and license templates developed as companion resources with the siting checklist, would support deployment at publicly accessible sites by standardizing key terms related to cost recovery, pricing, insurance, maintenance responsibilities, term length, and open-access requirements. Because public-benefit charging is often installed and operated by third-party charging providers under lease or license agreements with the property owner, and under third-party models, the templates would help agencies execute agreements more efficiently and consistently without having to negotiate each one individually.

⁶ Public-benefit sites are not only publicly accessible but designed and managed for broader societal benefits that private businesses may not be able to support. A public-benefit site may be set apart or distinguished in its location, its technological features or assets, and/or the benefits it provides the surrounding community and the electricity grid.

⁷ Existing and Expected EV Charging Infrastructure Conditions & Future Needs Analysis (2025)

⁸ [EPIC 4.03 – EV Charging Solutions for Parking-Constrained Customers](#)

Before the tools are finalized and distributed for broader regional application, the siting checklist should be developed and piloted at government-owned and/or public-benefit sites to guide decision-making on the siting, design, accessibility, and resilience functions to include at each site, inform key leasing and licensing options, considerations, and best practices, and test permitting, PG&E coordination, and cost recovery. AMBAG and other implementing partners would maintain the tools, while jurisdictions would retain control of their properties and implementation decisions.

This strategy addresses challenges and limitations from the EV CAR Framework's findings on rural grid constraints, unanticipated power outages, and charging gaps. Additionally, this strategy can support distributional equity by expanding access to EV charging infrastructure in and around multi-family housing and underserved, low income, rural, and agricultural communities that are not adequately served by the region's current charging network.

Implementation Actions

Implementation Actions	Implementing Partners
4.1. Create an EV charging best-practices siting checklist for public-benefit sites that helps implementing partners evaluate candidate locations and EV charging site features using EV CAR Framework findings on charging demand, community need, grid capacity, exposure to unanticipated outages, resilience value, accessibility, operations and maintenance, and community engagement needs.	AMBAG, Cities & Counties, Power Utility, Transportation Partners, CBOs, Charging Providers, Site Owners
4.2. Develop template leasing agreements for public benefit sites that benefit equity populations.	AMBAG, Cities & Counties, CBOs
4.3. Pilot template lease agreements at a subset of public-benefit sites to test how standardized agreements can support charger installation on public, community-serving properties. Lease templates should be used to clarify site access, equipment ownership, pricing and cost recovery, insurance, maintenance, uptime expectations, open-access requirements, data sharing, and responsibilities for community engagement and user support.	Cities & Counties, AMBAG, CBOs

Benefits & Outcomes

- Expands public-benefit charging opportunities for renters and residents of underserved communities which usually have fewer charging options.
- Reduces staff time, legal costs, and project-development uncertainty, particularly for underserved jurisdictions.
- Builds accessibility and equity into site selection before property acquisition and site design, reducing the risk of costly retrofits.
- Creates a tested, templated implementation model that can be a resource across the region.

Key Considerations

- **Accessibility:** The checklist should identify which accessibility requirements a project meets and which funding sources the project could qualify for. Relevant sources include 23 CFR Part 680, U.S. Access Board guidance, and Caltrans Design Information Bulletin (DIB) 82-06, with final requirements confirmed by the city, county, and PG&E.
- **Lease terms and pricing:** Build the templates from previously executed leasing agreements whose terms jurisdictions have already accepted, using those agreements as examples, and obtain legal review before jurisdictions use the templates.
- **PG&E Coordination:** Engage PG&E to prepare a siting checklist that reflects PG&E requirements and process needs, including electrical capacity screening and interconnection schedules.

2.5 Adaptation Strategy #5: Create Accessible, User-Centered EV Infrastructure Design and Service Delivery



Overview & Purpose

Community engagement conducted throughout the EV CAR Framework project identified opportunities to improve charging reliability, simplify payment, and make charging easier to use for people with disabilities and for residents who require instructions in languages other than English.⁹ This strategy would provide a practical set of user experience and equity resources for implementing partners for planning, contracting, and evaluating charging infrastructure.

Implementing partners should develop a central repository and plain-language handouts that consolidate existing requirements and guidance for physical accessibility, payment, reliability, signage, and accessible routes, consistent with funding requirements for grant-funded chargers. Additionally, implementing partners including AMBAG, cities, and counties should work with compensated CBO partners to fill remaining gaps, particularly by developing standard multilingual signage and operating instructions that can be used across the region.¹⁰

⁹ Existing and Expected EV Charging Infrastructure Conditions & Future Needs Analysis (2025)

¹⁰ INL/NREL (ChargeX Consortium), Customer-Focused Key Performance Indicators for Electric Vehicle Charging (2024).

This strategy can support structural equity by providing more equitable access to EV infrastructure through accessible charger design, multilingual information, and reduced barriers to charger use. The involvement of CBOs in developing and refining standards can also support procedural equity through ongoing community engagement and feedback.

Implementation Actions

Implementation Actions	Implementing Partners
5.1. Develop a central repository of existing design requirements, supplemented by a summary informational handout to make existing design requirements clear and accessible to implementing partners.	AMBAG, Transportation Partners, Cities & Counties, CBOs, Charging Providers
5.2. Develop resources in partnership with CBOs that support accessible charging, such as flexible payment options, multilingual instructions, help buttons, and support phone numbers.	AMBAG, CBOs, Cities & Counties
5.3. Partner with cities, counties, and CBOs to identify priority locations where user centered features are most needed.	Cities & Counties, AMBAG, CBOs
5.4. Consider conducting user experience surveys.	AMBAG, Cities & Counties, CBOs

Benefits & Outcomes

- Improves charging usability and reliability through clear signage and staffed or on-call assistance that can help first-time EV drivers navigate charging.¹¹
- Establishes measurable outcomes for successful charging, payment, uptime, accessibility, and language access.
- Builds physical and language accessibility into charging spaces, equipment, interfaces, and operating instructions.
- Makes user-centered requirements enforceable when they are incorporated into contracts, permits, and funding agreements.
- Provides local partners with a practical source for standards that are otherwise scattered across federal, State, and PG&E guidance.¹²

Key Considerations

- **Accessibility:** Identify the accessibility requirements that apply to each project, including requirements under the Americans with Disabilities Act (ADA), and use the remaining sources as design guidance. Relevant sources include 23 CFR Part 680 for federally funded projects, U.S. Access Board guidance, and Caltrans DIB 82-06.¹³ Confirm final requirements with the city, county, utility, and accessibility reviewers.
- **Language access:** Explore how to establish and reinforce clear, multilingual signage and operating instructions at the charger in partnership with CBOs.

¹¹ FHWA, National Electric Vehicle Infrastructure (NEVI) Minimum Standards, 23 CFR Part 680 (2023)

¹² Joint Office of Energy and Transportation, Public Electric Vehicle Charging Infrastructure Playbook (interactive resource, 2024)

¹³ 23 CFR Part 680 applies to NEVI and certain other public charging projects that use federal highway funds.

2.6 Adaptation Strategy #6: Address Charging Needs at Multi-Family Housing



Overview & Purpose

EV charging often takes place at home, but renters and residents of multi-family housing often do not have access to a dedicated parking spot or charger and lack authority to install charging equipment of their own. Many community members within this demographic also live in underserved communities, where public charging is not located nearby. The purpose of this strategy is to expand charging access for residents of multi-family properties through on-site and nearby charging infrastructure.

To support charging needs at multi-family housing, implementing partners have three primary approaches for expanding charging opportunities for existing multi-family housing:

1. The first approach uses cost-effective technologies in priority buildings such as smart Level 1 charging which is metered, load-managed, 120-volt outlets suited to overnight parking. These systems use the EV's portable charging cable (rather than a fixed in place cable) and may be able to provide nearly twice as many ports for the same investment as Level 2 charging while limiting total site demand.¹⁴
2. The second approach is a feasibility study which would evaluate curbside, utility pole-mounted, streetlight-mounted, and behind-the-meter options for residents without off-street parking.
3. The third approach develops model leasing and operating agreements that would assign equipment ownership, insurance, maintenance, and revenue responsibilities.

¹⁴ U.S. DOE Joint Office of Energy and Transportation / Volpe Center, *Community Charging: Emerging Multifamily, Curbside, and Multimodal Practices* (2024)

This strategy advances distributional equity by expanding access to EV infrastructure for renters, multi-family households, and underserved communities, while the use of compensated CBOs to identify priority neighborhoods supports procedural equity through community-informed decision-making.

Implementation Actions

Implementation Actions	Implementing Partners
6.1. Identify priority neighborhoods/buildings for innovative charging approaches including smart level 1 charging.	AMBAG, Cities & Counties, Power Utility, CBOs Organizations
6.2. Conduct feasibility study for curbside charging including behind the meter technologies.	Cities & Counties, AMBAG, Power Utility
6.3. Explore and establish leasing or operating agreements with property owners for multi-family buildings.	Cities & Counties, AMBAG
6.4. Streamline permitting and review process for multifamily serving EV charging infrastructure. Create single point of contact to interface with PG&E and project teams.	Cities & Counties, Power Utility

Benefits & Outcomes

- Extends home-area charging to renters and multi-family households that cannot install private chargers. ¹⁴Serves older and denser housing through curbside and behind-the-meter approaches where on-site Level 1 or 2 charging is difficult.
- Directs investment to high-need communities (such as Salinas, Marina, and Watsonville) instead of replicating existing charger locations.
- Complements the California Green Building Standards code (CALGreen) requirements for new buildings and California's Right to Charge laws with practical tools and incentive programs, such as 3CE charger rebates, for existing properties. ^{15,16}

Key Considerations

- **Technology fit:** Use smart Level 1 where vehicles remain parked for long periods and load management can avoid or defer upgrades; reserve faster charging for sites where demand requires it.
- **Curbside feasibility:** Consider right-of-way policy, ADA access, lighting, equipment ownership, and competing street uses before selecting utility pole-, streetlight-, or curb-mounted designs. These considerations may make curbside charging a longer-term approach.
- **Enforcement of Existing Building Codes:** Ensure new multifamily buildings and major retrofits are complying with California Building Code EV requirements and consider local reach codes to increase charging availability.

¹⁵ Check the current CALGreen rules for the building type and project. The 2025 code, including January 2026 updates, is in effect. Requirements differ for new construction and existing-building alterations.

¹⁶ CALGreen (California Building Code, Title 24, Part 11), multifamily EV-ready requirements

- **Adoption:** Existing buildings participate voluntarily, so deployment depends on tenant and resident demand, property-owner participation, and incentives that cover a substantial share of project cost. Right to Charge laws enable installations but do not fund them. ¹⁷

¹⁷ California "Right to Charge," Civil Code §1947.6 (residential tenants) and §4745 (common-interest developments)

2.7 Adaptation Strategy #7: Address Charging Needs at Rural and Agricultural Community-Serving Properties



Overview & Purpose

Rural and agricultural communities in southern Monterey and San Benito counties have few chargers, long travel distances, constrained grid feeders, and high exposure to unanticipated power outages, such as PSPS events. Statewide, only about 40 percent of rural communities are within ten minutes of a DC fast charger, compared with about 88 percent of urban communities.¹⁸ This strategy develops resilient charging at community-serving and agricultural properties using designs suited to low demand and limited grid capacity.

Analysis from the EV CAR Framework identified that in rural areas even a small number of chargers could burden already constrained grid infrastructure. In areas with low population densities upgrading this infrastructure for just a few households could prove cost prohibitive for residents. However, providing EV charging in these areas will be key to advancing regional resilience and distributional equity.

For this strategy, implementing partners including AMBAG, cities, counties, and others should work with jurisdictions, PG&E, rural communities, and property owners to expand resilient charging infrastructure at rural and agricultural community-serving properties. Implementation could include a voluntary, incentive-driven program, coordinated funding applications, or joint procurement.

¹⁸ CEC, *Assembly Bill 2127 Second Electric Vehicle Charging Infrastructure Assessment* (2024).

Implementing partners should first identify priority charging locations, including community-serving properties, workplaces, agricultural worksites, and other sites that can support everyday charging and emergency response. Sites should be prioritized based on exposure to unanticipated outages, grid constraints, underserved community needs, access for rural residents and workers, and community input. A feasibility study should then determine the appropriate mix of grid management technologies, such as on-site solar and storage, microgrids, smart charging, targeted grid upgrades, bidirectional charging, or mobile backup power. Mobile backup power systems may include trailer- or truck-mounted battery storage, portable generation, and bidirectional vehicles or fleets, such as electric school buses, which can supply electricity to charging equipment or buildings during an outage. Because these assets can serve multiple sites, implementing partners should identify rural staging locations where the systems can be stationed, charged or fueled, tested, and maintained between emergency events. Projects should be supported by leasing or operating agreements that assign ownership, funding, operation, maintenance, and permitting responsibilities, while rural-specific incentives help make otherwise uneconomical sites viable.

Implementation Actions

Implementation Actions		Implementing Partners
7.1.	Identify priority neighborhoods/locations for innovative charging approaches.	AMBAG, Cities & Counties, Power Utility, CBOs
7.2.	Identify locations to site mobile backup power systems when not actively used for emergencies. Establish protocols for emergency deployments.	AMBAG, Cities & Counties, Power Utility
7.3.	Define functional requirements for mobile backup power units.	Cities & Counties, EV Infrastructure Providers, Power Utility
7.4.	Conduct feasibility study for appropriate solutions for selected locations.	AMBAG, Cities & Counties, Power Utility
7.5.	Design and deploy charging infrastructure that considers grid capacity and risk of unanticipated outages due to extreme weather events, and opportunities for bi-directional charging to increase resilience.	Cities & Counties, Power Utility, AMBAG
7.6.	Explore and establish leasing or operating agreements with property owners.	Cities & Counties, AMBAG
7.7.	Incorporate equity into charging program design by ensuring pricing structures, enrollment requirements, communication platforms, and charging schedules are accessible to renters, low-income households, shift workers, unbanked residents, people with disabilities, and users with limited digital access.	CBOs, EV Infrastructure Providers, Cities & Counties, AMBAG

Benefits & Outcomes

- Closes charging gaps in rural areas where travel distances are long and public options are scarce.
- Uses grid-light solutions where conventional upgrades would be costly relative to expected demand.
- Maintains charging and critical loads during unanticipated outage events through onsite power production, storage, microgrids, and bidirectional applications.
- Serves farmworker and rural communities through public-facing and workforce access.
- Increases utility of purchased backup mobile power systems for deployment between emergency events.

Key Considerations

- **Technology fit:** Use Level 2 charging with load management for long-duration dwell locations and reserve direct current (DC) fast charging or electrical infrastructure upgrades or faster charging for sites where demand supports the cost.
- **Resilience maturity:** Size onsite production, storage, and microgrids for the site's critical loads. Design for bidirectional charging where useful, while recognizing that vehicle-to-grid applications are still emerging.
- **Deployment plan:** Establish activation triggers, staging locations, dispatch authority, transportation routes, and site contacts before an outage.

2.8 Adaptation Strategy #8: Co-locate EV Charging at Mobility Hubs and Resiliency Centers



Overview & Purpose

Mobility hubs connect transit, shared mobility, auto, and EV charging, while resiliency centers provide community services (e.g., power, EV charging, food, water, shelter-in-place refuge, etc.) during grid outages and extreme weather events. This strategy would support the creation of mobility hubs at resiliency centers by building the EV charging infrastructure that enables a single site to serve both functions. This strategy concentrates investment where people already gather, improves first- and last-mile connections, and allows for essential mobility during unanticipated outages from extreme weather events. This approach reflects the EV CAR Framework's discussion about the community and resilience value of co-locating these assets and aligns with feedback from community outreach, which called for better transportation options.

Implementing partners including AMBAG, cities, counties, transit agencies, and Office of Emergency Services should work to establish shared, equity-weighted site-selection criteria using transit access, community preferences, grid capacity, exposure to unanticipated outages, and underserved community indicators. Resiliency centers should combine EV charging with on-site production, battery storage, microgrids, or other backup power sized to critical loads.

Implementing partners including AMBAG and other local jurisdictions should work to incorporate the criteria and priorities into regional plans, while transit agencies, cities, counties, and emergency-management partners should choose and implement projects at sites they control.

This strategy advances distributional equity by co-locating EV charging with transit and community-serving destinations. The use of equity-weighted site-selection criteria, underserved community indicators, and community preferences also aligns with procedural equity and the prioritization of investments in highest-need communities.

Implementation Actions

Implementation Actions	Implementing Partners
8.1. Identify resiliency sites that would benefit from co-location of EV charging infrastructure.	AMBAG, Transportation Partners, Power Utility, CBOs
8.2. Develop equity-weighted site selection criteria.	AMBAG, Transportation Partners, Cities & Counties
8.3. Select appropriate technologies, including mobile backup systems, solar plus storage, and EV charging infrastructure.	EV Infrastructure Providers, AMBAG, Power Utility, Cities & Counties
8.4. Coordinate early with utilities, emergency management agencies, and charging providers.	Cities & Counties, AMBAG, Power Utility
8.5. Integrate EV charging and resilience features at priority sites. Where feasible, site design should address backup power for the charging equipment and the site's critical loads. Sites should also accommodate shared mobility services such as EV car share and vanpools.	Transportation partners, Power Utility, Cities & Counties, AMBAG

Benefits & Outcomes

- Places charging at resiliency centers strengthening the ability of these sites to provide services during outages.
- Maintains charging and critical community services during extreme weather events which could also support evacuation and emergency response.

Key Considerations

- **Accountability:** Assign one end-to-end co-lead for each project. Transit agencies, cities, and counties generally lead mobility hubs; cities/counties and emergency-management agencies generally lead resiliency centers; AMBAG coordinates the regional program.
- **Siting criteria:** Prioritize deployment locations using the density of charging need, available grid capacity, and permitting constraints, consistent with PG&E siting guidance.
- **Resilience design:** Size solar, storage, and microgrids to the resiliency center's critical loads, with bidirectional charging or mobile backup as complementary options.¹⁹

¹⁹ NREL, *Ensuring Resilient Operations of Solar-Plus-Storage Community Resilience Hubs* (2024).

2.9 Adaptation Strategy #9: Design and Deploy Shared EV Mobility Options



Overview & Purpose

Many rural community members face transportation barriers such as the high cost of owning a personal vehicle, and a lack of active transportation facilities nearby. Due to the cost of EVs and a general lack of infrastructure, rural and farm working communities are less likely to own EVs, as are renters and households without garages.²⁰ Shared EV car-share, short-term rental, and vanpool services can provide clean mobility without the cost and responsibilities of vehicle ownership. This strategy advances the charging that shared services require, including chargers at accessible host sites, depot charging sized for vanpool duty cycles, and capacity that could support electrification of the existing CalVans fleet serving the region.

Building on the Monterey Bay region's success in securing funding to meet the mobility needs of underserved communities, such as two Clean Mobility Options assessment grants and a Sustainable Transportation Equity Project (STEP) grant, implementing partners should begin with a community needs assessment and then work with funded CBOs to co-design appropriate service models and programs and conduct outreach. Implementation should include accessible host sites, charging infrastructure, pricing and enrollment processes, funding, education, and outreach.

²⁰ Existing and Expected EV Charging Infrastructure Conditions & Future Needs Analysis (2026)

Potential models this strategy could use include *Míocar*, a rural EV car-share program focused on rural California, and CalVans, the public vanpool authority that already serves farmworkers in Monterey County and throughout the Central Coast.^{21,22} *Míocar* launched service in Watsonville in 2025, providing a local test case for this strategy. Given that rural services rarely recover their full operating costs through fares, a transit agency, CalVans, or another designated operator would need to provide a stable, long-term operating home and secure ongoing public funding beyond initial start-up grants.

This strategy advances distributional equity by expanding access to mobility options for renters, farmworkers, and households without the burden of vehicle ownership. Public education materials, outreach, and enrollment support also advance structural equity by increasing EV-related knowledge.

Implementation Actions

Implementation Actions		Implementing Partners
9.1.	Identify priority communities for EV rental/car sharing.	AMBAG, Cities & Counties, CBOs, Local & Regional Funders
9.2.	Partner with cities, counties, and property owners to host vehicles at accessible locations.	Cities & Counties, Transportation Partners, AMBAG
9.3.	A Identify funding providers and design an implementation pathway.	AMBAG, Local & Regional Funders
9.4.	Develop public education materials about shared EV mobility options.	AMBAG, CBOs, Power, Transportation Partners
9.5.	Work with CBOs to design and deliver outreach and enrollment.	CBOs, AMBAG, Cities & Counties

Benefits & Outcomes

- Extends access to clean mobility for renters, households without vehicles, farmworkers, and other residents who cannot rely on private vehicle ownership.
- Applies community-designed program models developed through California's Clean Mobility Options and Sustainable Transportation Equity programs, subject to available funding.
- Builds on existing operators, host sites, and charging infrastructure, including CalVans and regional transit agencies.

Key Considerations

- **Agricultural duty cycles:** Work with existing vanpool operators to understand routing constraints before selecting vehicles and routes. Consider using mobile backup charging, as described in Strategy #3, to address range concerns on demanding agricultural routes.

²¹ *Míocar* rural EV car-share (CALCOG; UC Institute of Transportation Studies evaluation)

²² *Míocar* and CalVans are examples to study; Service area, vehicles, charging needs, operator capacity, and ongoing funding are important considerations for potential operating models for the region.

2.10 Adaptation Strategy #10: Facilitate Regional Collaborative Planning and Implementation to Advance Equitable Climate-Resilient EV Infrastructure



Overview & Purpose

This strategy addresses a core implementation gap identified in the EV CAR Framework: no single agency can deliver an equitable, climate-resilient EV charging network alone. Charger deployment, grid readiness, climate vulnerability, community priorities, funding, permitting, and PG&E coordination all involve different partners with different authorities. However, regional coordination can help translate the Framework's findings into shared priorities, near-term implementation, and longer-term investment pathways.

Regional collaboration could take place through an existing convening, such as the Monterey Bay Area Regional Climate Project Working Group (RCPWG) or Central Coast Climate Collaborative (4C) and create a focused EV charging implementation subcommittee. A recurring forum for collaboration, AMBAG and local governments, charging providers, utilities, transportation agencies, CBOs, and funders can coordinate early before constraints affect charging reliability or equitable access. The forum would provide an avenue to review priority geographies, track implementation needs, coordinate funding opportunities, discuss grid and permitting barriers, and identify where joint action could reduce costs or accelerate deployment. Additionally, rather than treating resilience as a later-stage add-on, the forum should help ensure that resilience is built into equity-focused charging investments from the outset, particularly through siting decisions, backup power, storage, operations and maintenance requirements, and coordination with local emergency planning.

The strategy would also support local jurisdictions as they plan for transportation electrification and help incorporate the EV CAR Framework vulnerability findings into regional and local plans. Over time, the forum could identify additional research needs, such as battery lifecycle management, charging reliability standards, emergency charging roles, or financing tools for rural and underserved and low-income communities.

This strategy advances procedural equity by establishing a recurring forum for coordination among public agencies, CBOs, utilities, charging providers, and other implementation partners. The strategy also supports a fair and transparent process for EV infrastructure decision-making through shared prioritization, implementation tracking, and collaborative planning.

Implementation Actions

Implementation Actions	Implementing Partners
10.1. Establish a forum for advancing and coordinating implementation. Utilize an existing convening such as the Monterey Bay Area Regional Climate Working Group (RCPWG) or Central Coast Climate Collaborative (4C) and potentially establish a subcommittee focused on EV charging implementation.	AMBAG, CBOs, Cities & Counties
10.2. Identify priority areas for early coordination with local governments and charging providers before capacity constraints or power outages materially affect service.	AMBAG, CBOs, Cities & Counties, EV Infrastructure Providers, PG&E
10.3. Explore cost saving and joint procurement options, explore collaborative engineering strategies to help streamline design and share costs, explore and pursue innovative financing structures.	AMBAG, Local & Regional Funders, Cities & Counties, EV Infrastructure Providers
10.4. Support jurisdictions to plan for electrification (AB39).	AMBAG, Cities & Counties, Local & Regional Funders
10.5. Identify opportunities for incorporating vulnerability findings into regional plans.	AMBAG, Cities & Counties
10.6. Conduct additional studies as critical information needs are identified, such as battery lifecycle management, charger reliability and maintenance needs, utilization trends, and emerging grid integration technologies.	AMBAG, Cities & Counties, Power Utility, EV Infrastructure Providers
10.7. Explore and pursue, in partnership with community-based organizations, strategies to ensure lower-income and underserved community members are not excluded from the benefits of accessing EVs and the necessary charging infrastructure.	AMBAG, CBOs, Local & Regional Funders

Benefits & Outcomes

- Creates a clear implementation pathway by turning the EV CAR Framework from a planning document into an ongoing regional coordination process.
- Improves alignment across jurisdictions and partners by giving local governments, PG&E, charging providers, transportation agencies, funders, and CBOs a shared place to coordinate priorities and next steps.
- Supports more equitable deployment by creating a forum to focus on inclusion of lower-income, renter, rural, and underserved communities in the EV adoption cycle.
- Reduces implementation costs and delays by exploring joint procurement, shared engineering approaches, coordinated grant applications, and innovative financing structures.
- Strengthens climate resilience by helping partners incorporate PSPS exposure, grid constraints, and community vulnerability findings into project selection, design, and regional planning.
- Improves readiness for future funding by maintaining a pipeline of priority projects that are better defined, better coordinated, and easier to advance when funding becomes available.

Key Considerations

- **Avoid duplicating existing efforts:** The strategy should build from existing convenings where possible rather than creating a new process that adds administrative burden without clear value.
- **Forum design and authority:** The coordination structure should have a clear purpose, participation expectations, decision-making process, and relationship to existing regional planning forums.
- **Early coordination is critical:** Priority areas should be identified before grid constraints, permitting delays, or power outages become major barriers to service.
- **Balance regional consistency with local flexibility:** The forum can establish shared principles, templates, and priorities while allowing each jurisdiction to adapt implementation to local conditions.
- **Data sharing and confidentiality:** Grid capacity, charger utilization, cost, and project pipeline information may be sensitive or incomplete, so partners may need clear protocols for sharing and using information.

2.11 Adaptation Strategy #11: Direct Funding and Incentives Towards Underserved Communities



Overview & Purpose

This strategy addresses a key equity challenge identified throughout the EV CAR Framework: without intentional public investment, EV infrastructure, incentives, and associated benefits are likely to remain concentrated in communities that already possess greater financial resources, stronger market demand, and better existing charging access. Community engagement conducted as part of the Framework identified cost, charging access, renter limitations, and lack of awareness regarding EV programs as significant barriers to adoption, particularly among underserved populations. Directing investments and incentives toward underserved communities can help ensure that EV adoption advances regional climate goals while also increasing transportation equity, community resilience, and access to economic opportunity.

Equitable investment does not simply mean distributing charging infrastructure evenly. Rather, it means directing resources toward communities that face the greatest barriers to EV adoption and are least likely to benefit from market-driven deployment alone. The approach includes funding publicly accessible charging infrastructure, supporting EV affordability programs, coordinating multiple funding sources, and working closely with CBOs to ensure investments reflect community priorities and maximize accessibility.

This strategy focuses on aligning public funding, PG&E investments, incentive programs, and future grant opportunities with areas that face both transportation inequities and heightened climate-related vulnerabilities. Priority investment areas should be identified using the EV CAR Framework's Equity Guardrail Criteria, community engagement findings, climate vulnerability analysis, grid capacity analysis, and risk archetypes.

This strategy advances distributional equity by prioritizing EV infrastructure investments for highest-need communities and expanding fair and inclusive access to EV infrastructure. Partnerships with CBOs to identify community priorities and inform program design also support procedural equity. EV affordability programs and community education programs support structural equity by providing affordable and equitable access to EV infrastructure and increasing EV-related knowledge.

Implementation Actions

Implementation Actions		Implementing Partners
11.1.	Prioritize funding for publicly accessible charging infrastructure in renter-dominated neighborhoods, multifamily housing areas, and communities with limited access to private home charging.	AMBAG, CBOs, Local & Regional Funders, Cities & Counties, EV Infrastructure Providers
11.2.	Scale up the deployment of targeted EV incentive programs focused on underserved communities, including vehicle purchase assistance, charging incentives, and community education programs.	AMBAG, CBOs, Local & Regional Funders, Cities & Counties, EV Infrastructure Provider, Power Utilities
11.3.	Streamline application, eligibility verification, and reimbursement requirements to reduce participation barriers for low-income households and small organizations.	AMBAG, Local & Regional Funders, Cities & Counties
11.4.	Coordinate funding timelines and requirements across agencies and utilities to more comprehensively and effectively direct available resources to underserved communities.	AMBAG, CBOs, Local & Regional Funders, Cities & Counties

Benefits & Outcomes

- Expands access to EV benefits for low-income households, renters, rural residents, and underserved communities that may otherwise be left behind during the transition to electric transportation.
- Advances climate and transportation equity by directing investments toward locations with documented mobility, affordability, and charging access challenges identified through community engagement and equity analysis.
- Improves regional resilience by ensuring vulnerable communities have access to reliable transportation options and charging infrastructure before climate-related disruptions become more severe.
- Supports rural economic development by leveraging EV charging investments to attract visitors, travelers, and spending to small communities located along key transportation corridors.
- Increases utilization and return on investment by targeting infrastructure where unmet demand, charging gaps, and community need overlap.
- Builds trust and participation through partnerships with CBOs that can help shape program design, improve outreach effectiveness, and reduce participation barriers.

Key Considerations

- **Funding coordination:** Align regional, State, federal, utility, and local funding timelines so priority communities can layer resources for infrastructure, vehicles, outreach, operations, maintenance, and resilience features. Where possible, coordinate applications across jurisdictions to reduce administrative burden and strengthen competitiveness.

2.12 Adaptation Strategy #12: Sustain Local EV Awareness Campaigns that Advance EV Adoption with Local Partners



Overview & Purpose

This strategy addresses one of the most consistent barriers identified through community engagement: many residents, particularly in underserved communities, lack access to trusted, culturally relevant, and language-accessible information about EVs, which can create barriers to community participation in the region's EV transition. Findings from community outreach found that cost concerns, limited familiarity with EV technology, language barriers, renter constraints, and skepticism regarding EV performance during power outages all influence adoption decisions.

Sustained outreach and education efforts through culturally relevant, multilingual outreach and education can help ensure that EV adoption is driven not only by infrastructure deployment, but also by community understanding, trust, and confidence. Building public awareness of the overall EV driving experience, including the associated costs, maintenance requirements, charging considerations, and available incentives, can empower community members to make informed decisions about EV adoption and ensure the benefits of the region's EV transition are shared broadly. Partnerships with trusted CBOs are particularly important in order to leverage established relationships with populations that traditional agency outreach often misses. CBOs can also help establish pathways for two-way communication between public agencies and communities, thereby creating ongoing feedback cycles that reinforce procedural equity.

This strategy advances a long-term approach to EV engagement and education that relies on trusted local partners to deliver culturally relevant, multilingual, and community-centered information. Rather than treating outreach as a one-time activity associated with infrastructure installation or grant funding, this strategy supports ongoing engagement that evolve alongside the region's expanding EV charging network. CBOs should play a leading role in designing and delivering outreach programs, identifying community concerns, and helping implementing agencies understand barriers to adoption. Outreach efforts should be integrated into existing community events, public programs, schools, neighborhood organizations, and social service networks to maximize participation and reduce outreach fatigue.

Implementation Actions

Implementation Actions	Implementing Partners
12.1. Obtain sustained funding to support community-based organization capacity to lead EV awareness, education, and engagement efforts in underserved communities.	AMBAG, CBOs, Local & Regional Funders
12.2. Design culturally sensitive, in-language outreach materials and activities.	AMBAG, CBOs, Cities & Counties
12.3. Integrate EV education into existing community services and events.	AMBAG, CBOs, Cities & Counties
12.4. Create feedback loops between CBOs and implementing agencies.	AMBAG, CBOs, Cities & Counties
12.5. Track outreach outcomes and adapt strategies over time.	AMBAG, CBOs, Cities & Counties

Benefits & Outcomes

- Supports equitable adoption by making sure that underserved communities receive information, resources, and opportunities to participate in the transportation electrification transition.
- Increases EV awareness and understanding by providing accessible, culturally relevant information about vehicle ownership, charging options, costs, incentives, and emerging technologies.
- Builds trust in EV technology by addressing misconceptions regarding reliability, charging accessibility, emergency preparedness, and total cost of ownership.
- Advances Equity Guardrails objectives by promoting procedural equity through engagement and structural equity through increased EV knowledge and awareness.
- Improves effectiveness of public investments by helping residents understand and utilize infrastructure and incentive programs that have already been funded.
- Strengthens community-agency relationships through ongoing engagement and two-way communication rather than one-way information sharing or sporadic project-based outreach.
- Generates more responsive implementation decisions by creating opportunities for agencies and infrastructure providers to learn directly from community experiences and concerns.

Key Considerations

- **Trust matters:** Residents are often more likely to engage with information delivered by trusted local organizations than through traditional government outreach alone.
- **Language access is essential:** Outreach materials, events, and educational resources should be available in the languages spoken by the communities being served and reflect local cultural contexts.
- **Outreach must be sustained:** One-time campaigns rarely produce lasting behavior change. Long-term funding and organizational capacity are critical to maintaining community awareness and engagement.
- **Information should be practical and actionable:** Residents need clear information about available incentives, charging options, vehicle costs, emergency preparedness considerations, and local resources.
- **Meet communities where they are:** Integrating outreach into existing community events, schools, faith organizations, neighborhood programs, and service networks can increase participation and accessibility.
- **Feedback should shape decisions:** Community engagement should be used not only to disseminate information but also to identify barriers, evaluate programs, and inform future implementation .
- **Measure effectiveness:** Outreach programs should track participation, awareness outcomes, program utilization, and changes in community knowledge to guide future investments.



MEMORANDUM

TO: AMBAG Board of Directors

FROM: Maura F. Twomey, Executive Director

RECOMMENDED BY: Amaury Berteaud, Director of Sustainability Programs

SUBJECT: Update on the Central California Rural Regional Energy Network

MEETING DATE: October 14, 2026

RECOMMENDATION:

Receive a presentation on the Central California Rural Regional Energy Network.

BACKGROUND/ DISCUSSION:

On September 26, 2024, the CPUC issued decision D.24.09.31, Approving the creation of the Central California Rural Regional Energy Network (CCR REN). The CCR REN received approximately \$36 million to implement programs, primarily from 2025 through 2027. The CCR REN is a partnership between AMBAG, the County of San Luis Obispo, County of Ventura, High Sierra Energy Foundation, and San Joaquin Valley Clean Energy Organization, with a vision to support an equitable and affordable clean energy transition for underserved communities. The AMBAG Board of Directors approved an MOU formalizing the governance structure of the CCR REN on October 9, 2024 and authorized a funding agreement on February 12, 2025 for AMBAG to receive funds from the County of San Luis Obispo, the lead administrator for the CCR REN.

This year, AMBAG continued working with partners to operate CCR REN programs and are excited to provide an update on the progress achieved so far. For the Commercial program, over \$600,000 of incentives were disbursed, retrofitting 39 small businesses and non-profits at no cost. In the AMBAG region, twelve customers were retrofitted, receiving more than \$160,000. For the residential program, AMBAG launched a residential energy modelling tool, which allows residents to look up their address and model the impact of making energy efficiency retrofits. Staff are also working in the community to promote a no-cost energy efficiency kit for residents to save energy by installing simple free energy efficiency measures such as LED lightbulbs and power strips. For the Codes and Standards program, staff organized one in person event as well promoted seven online classes. Staff also conducted outreach on the energy codes

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coach services, which provides jurisdictional staff and contractor technical assistance in answering codes questions. In the public sector, AMBAG continued promoting existing programs that are already available to public agencies, identifying over \$500,000 in potential PG&E incentives, and worked with jurisdictions identify potential resiliency center sites and sources of funding. Staff supported a number of jurisdictions with grant applications to fund HVAC system improvements and provide enhanced cooling capabilities at libraries and community centers in the Salinas and Pajaro Valleys.

On the regulatory front, AMBAG staff worked with the CCR REN partners and submitted a 2028-2035 business plan and 2028-2031 Portfolio application to the CPUC in order to continue and expand the scope of CRR REN programming on March 1, 2026. Assuming approval of the application as submitted, the CCR REN will be able to significantly scale the successful commercial program and launch a new strategic energy management (SEM) program to yield even larger energy savings for medium-size businesses. The new business plan will also launch an Integrated Demand side Management (IDSM) Program. The SEM program works to educate customers and develop opportunities to reduce their energy use through operational improvements and equipment replacements. The IDSM program will allow staff to provide technical assistance for solar battery storage projects and demand response initiatives, currently an unmet need, especially for public agencies.

In recent months, CCR REN has engaged with the regulatory process, answering data requests and responding to questions issued by the CPUC staff. This process is slated to continue until mid-2027, when a decision will be issued on the applications filed by each portfolio administrator, including CCR REN. AMBAG staff will continue to work with CCR REN partners to engage in the regulatory process and obtain approval for the submitted business plan

ALTERNATIVES:

None.

FINANCIAL IMPACT:

The implementation of CCR REN programs is fully funded under the CCR REN funding agreement with the County of San Luis Obispo. All funding is programmed in the FY 2026-27 Overall Work Program and Budget.

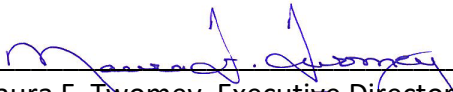
COORDINATION:

AMBAG is working with partners to launch the Central California Rural Regional Energy Network. Partners include San Luis Obispo and Ventura Counties, the High Sierra Energy Foundation, and the San Joaquin Valley Clean Energy Organization.

ATTACHMENTS:

None.

APPROVED BY:



Maura F. Twomey, Executive Director

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2026 AMBAG Calendar of Meetings

***November 18, 2026**

MBARD Board Room

24580 Silver Cloud Court, Monterey, CA 93940

Meeting Time: 6 pm

December 2026

No Meeting Scheduled

*** The AMBAG November Board of Directors meeting has been moved to the third Wednesday of the month due to Veteran's Day Holiday.**

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AMBAG Acronym Guide	
ABM	Activity Based Model
ACFR	Annual Comprehensive Financial Report
ADA	Americans Disabilities Act
ALUC	Airport Land Use Commission
AMBAG	Association of Monterey Bay Area Governments
ARRA	American Reinvestment and Recovery Act
3CE	Central Coast Community Energy
CAAA	Clean Air Act Amendments of 1990 (Federal Legislation)
Caltrans	California Department of Transportation
CalVans	California Vanpool Authority
CARB	California Air Resources Board
CCJDC	Central Coast Joint Data Committee
CEQA	California Environmental Quality Act
CHTS	California Households Travel Survey
CMAQ	Congestion Mitigation and Air Quality Improvement
CPUC	California Public Utilities Commission
CTC	California Transportation Commission
DEIR	Draft Environmental Impact Report
DEM	Digital Elevation Model
DOF	Department of Finance (State of California)
EAC	Energy Advisory Committee
EIR	Environmental Impact Report
FAST Act	Fixing America's Surface Transportation Act
FHWA	Federal Highway Administration
FTA	Federal Transit Administration
FTIP	Federal Transportation Improvement Program
GHG	Greenhouse Gas Emissions
GIS	Geographic Information System
ICAP	Indirect Cost Allocation Plan
IIJA	Infrastructure Investment and Jobs Act
ITS	Intelligent Transportation Systems

JPA	Joint Powers Authority
LTA	San Benito County Local Transportation Authority
LTC	Local Transportation Commission
MAP-21	Moving Ahead for Progress in the 21 st Century Act
MBARD	Monterey Bay Air Resources District
MOA	Memorandum of Agreement
MOU	Memorandum of Understanding
MPAD	Monterey Peninsula Airport District
MPO	Metropolitan Planning Organization
MST	Monterey-Salinas Transit
MTP	Metropolitan Transportation Plan
MTIP	Metropolitan Transportation Improvement Program
OWP	Overall Work Program
PG&E	Pacific Gas & Electric Company
PPP	Public Participation Plan
RAPS, Inc.	Regional Analysis & Planning Services, Inc.
RFP	Request for Proposal
RHNA	Regional Housing Needs Allocation
RTDM	Regional Travel Demand Model
RTP	Regional Transportation Plan
RTPA	Regional Transportation Planning Agency
SB 375	Senate Bill 375
SBtCOG	Council of San Benito County Governments
SCCRTC	Santa Cruz County Regional Transportation Commission
SCMTD	Santa Cruz Metropolitan Transit District
SCS	Sustainable Communities Strategy
S RTP	Short-Range Transit Plan
STIP	State Transportation Improvement Program
TAMC	Transportation Agency for Monterey County
TAZ	Traffic Analysis Zone
USGS	United States Geological Survey
VMT	Vehicle Miles Traveled
VT	Vehicle Miles Trips