

Program Goal, Objectives, and Eligibility Criteria

Goal
Improve mobility for seniors and individuals with disabilities throughout the region by removing barriers to transportation services, expanding transportation mobility options, and providing transportation services that meet the special needs of seniors and individuals with disabilities.

Objectives
<ul style="list-style-type: none">• Fund projects that are derived from either the very-high priority or high priority strategies for addressing gaps in transportation service outlined in the Coordinated Plan• Fund innovative and flexible programs that provide transportation services specifically designed to meet the special needs of seniors and individuals with disabilities in the San Diego region and that strive for continual improvement as demonstrated by capacity building and increases in seniors and individuals with disabilities served• Provide incentives for the coordination among specialized transportation providers to create efficiencies in service delivery, reduce duplication of services, and address any gaps in service for seniors and individuals with disabilities• Encourage cost-efficient service provision through coordination, innovation, and the leveraging of matching funds

Eligibility Criteria
<ol style="list-style-type: none">1. Is the applicant an eligible applicant¹?2. In the applicant’s civil rights assurances, are adequate methods included for ensuring that the benefits of the project are distributed equitably amongst low-income and minority (LIM) and non-LIM population groups in its service area?3. Will 80 percent of the riders be the target population²?4. Is the total grant request per project between \$30,000 and \$250,000 per year and is the total grant amount requested by the applying agency equal to or less than \$600,000 per year?5. Is the project derived from a Very High or High Priority strategy in the 2020 Coordinated Plan?<ul style="list-style-type: none">• Maintain existing effective and efficient transportation services• Continue providing existing curb-to-curb, door-to-door (and door-through-door, when necessary) services for trips such as non-emergency medical transportation and grocery shopping in circumstances where paratransit is insufficient, inappropriate, or unavailable• Maintain assets in a state of good repair• Develop or expand transit or transportation solutions in areas with little or no other transportation options based on identified gaps• Develop or expand transit or transportation solutions in areas with sufficient densities to support specialized transportation or coordinated services based on identified gaps• Provide new curb-to-curb, door-to-door (and door-through-door, when necessary) services for trips such as nonemergency medical transportation and grocery shopping in circumstances where paratransit is insufficient, inappropriate, or unavailable Improve first-mile/last-mile strategies to better connect to transit• Increase work-based transit service hours of operation to assist nontraditional work schedules• Increase interagency coordination efforts to maximize existing capacity• Increase interagency coordination of resources• Implement interagency partnerships to secure funding• Increase the level of service on fixed-route services• Improve access to available services through coordination and enhanced customer service that connects riders to transit or specialized transportation services that most appropriately meets their needs

¹ Eligible applicants differ between the Senior Mini-Grant and Federal Transit Administration (FTA) Section 5310 programs and are listed on the next page.

² The target population for the Senior Mini-Grant program is seniors (defined as individuals age 60 and older). The target population for the FTA Section 5310 program is seniors (defined as individuals age 65 and older) and individuals with disabilities of any age.

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- Develop public-private partnerships to provide innovative transportation solutions
- Provide educational resources to encourage more individuals to ride public transit
- Evaluate and upgrade transit stops and amenities where appropriate

Eligible Geography, Applicants, and Projects

	Senior Mini-Grant	Section 5310
Eligible Geography	Within San Diego County	Within the urbanized areas of San Diego County (as defined by the 2010 Census)
Eligible Applicants	<ul style="list-style-type: none"> • Local government agencies • Private and public operators of public transportation • Nonprofit organizations • Tribal governments • Social service agencies 	<p><i>Traditional Section 5310</i></p> <ul style="list-style-type: none"> • Private nonprofit organizations • State or local governmental authorities that: <ul style="list-style-type: none"> ○ Are approved by a state to coordinate services for seniors and individuals with disabilities ○ Certify that there are no nonprofit organizations readily available in the area to provide the service <p><i>Non-Traditional Section 5310</i></p> <ul style="list-style-type: none"> • Private nonprofit organizations • State or local governmental authorities • Operators of public transportation
Project Types	<ul style="list-style-type: none"> • Operating (OP) • Mobility Management (MM) • Capital (CAP) 	<ul style="list-style-type: none"> • Operating (OP) • Mobility Management (MM) • Capital (CAP)
Eligible Projects	<ul style="list-style-type: none"> • Senior shuttles • Travel training programs • Volunteer driver programs • Non-emergency medical transportation • Mobility management • The brokerage of multi-jurisdictional transportation services 	<p><i>Traditional Section 5310</i></p> <ul style="list-style-type: none"> • Vehicle procurement • Support equipment (e.g. computer hardware and software, transit-related intelligent transportation systems, and dispatch systems) • Contract transportation services • Mobility management and coordination programs <p><i>Non-Traditional Section 5310</i></p> <ul style="list-style-type: none"> • Volunteer driver programs • Shuttle, ridesharing and vanpooling programs • Non-emergency medical transportation • Transit travel training

Organization Application Evaluation Criteria

Organization Application Criteria		Points
A. Project Readiness and Technical Capacity		20
1.	How comprehensive are the applicant’s proposed strategies to overcome unique challenges in providing transportation to their proposed and/or existing clients?	5
2.	Does the applicant demonstrate a commitment towards continuous improvement as evidenced by established or proposed policies, procedures, and/or strategies to build their own technical capacity and grow the program?	5
3.	To what extent does the applicant demonstrate project readiness in providing transportation services? Does the applicant have an established client base? Does the applicant have appropriate resources (dispatching and scheduling software, vehicles, etc. as applicable), staffing (volunteer drivers, telephone operators, etc. as applicable) and materials (marketing, in-take forms, etc.) to be able to deliver service?	5
4.	To what extent does the applicant demonstrate the technical capacity to manage a grant? Does the applicant have a fiscal management system, business practices, and/or other resources that will enable their organization to successfully manage a grant, if awarded, including required invoicing and reporting?	5
B. Coordination and Program Outreach		10
5.	To what extent does the project demonstrate coordination? If the applicant identifies an existing or proposed relationship with another agency, for coordination and/or the full or partial provision of transportation services, did the applicant attach one or more letters of support from the identified agency confirming the relationship?	5
6.	How comprehensive are the applicant’s proposed strategies for marketing the project and promoting public awareness in both low income and minority areas as well as populations with limited English proficiency? Has the applicant established provisions that ensure the equitable distribution of services?	5
Organization Application Total Points		30

Project Proposal Evaluation Criteria

No.	Project Type	Project Proposal Criteria	Points		
			OP	MM	CAP
C. Goal and Objectives					
7.	ALL	How well does the proposed transportation project remove barriers to transportation and expand transportation mobility options for seniors and individuals with disabilities?	5	5	5
8.	ALL	How well does the proposed transportation service(s) meet the special transportation needs of the target population and increase access to facilities, services, and activities that contribute to the target population's well-being and quality of life (including, but not limited to, healthcare; grocery shopping; nutrition programs; and social, recreational, civic, and religious activities)?	5	5	5
D. Operational/Implementation Plan					
9.	Operating (OP)/ Mobility Mgmt. (MM)	How thorough is the implementation plan? Does the proposal include project tasks, staffing and resources used in implementation? Does the implementation plan seem feasible?	5	5	N/A
10.	OP/MM	Does the applicant have an effective method for managing current demand? Does the applicant have a strategy or plans to meet future demand?	5	5	N/A
9.	CAP (Capital)	How thorough is the operational plan? Does the proposal provide detail on the transportation service to be provided by grant-funded vehicles and describe day-to-day operations, including dispatching and scheduling?	N/A	N/A	5
10.	CAP	How thorough is the applicant's procedures for preventative and routine vehicle maintenance, driver training, and other safety measures?	N/A	N/A	5
E. Cost-Efficiency and Program Effectiveness					
11.	ALL	Is the proposed cost per one-way passenger trip reasonable given the service being provided?	5	5	5
12.	ALL	How comprehensive are the applicant's proposed methodologies and procedures for ongoing monitoring and evaluation of the project's efficiency, and steps to achieve greater efficiencies?	5	5	5
13.	ALL	How comprehensive are the applicant's proposed methodologies and procedures for ongoing monitoring and evaluation of the project's effectiveness in providing appropriate transportation to the target population, and steps to be taken if original goals are not achieved?	5	5	5
F. Operational Sustainability					
14.	ALL	Has the applicant demonstrated an effort to raise and diversify funding as evidence by fundraisers, expansion of donor base, the pursuit of grant funding outside those distributed by SANDAG, cooperative agreements, and other fundraising efforts?	5	5	5
15.	ALL	Has the applicant secured matching funds? To what extent is the source of local share stable? (Note: Grant funding through SANDAG's Specialized Transportation Grant Program is not guaranteed.)	5	5	5
G. Innovation					
16.	ALL	Does the project exhibit flexibility in responding to the special and changing transportation needs of the target population? Does the project include creative solutions or innovations that could be applied to other services in the region?	5	5	5
17.	ALL	Are there elements of the project that are environmentally sustainable (including grouping trips and the use of alternative fuels or clean air vehicles)?	5	5	5

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No.	Project Type	Project Proposal Criteria	Points		
			OP	MM	CAP
H. Performance Indicators					
18.	OP	<u>Proposed Cost per One-Way Passenger Trip</u> Points \$9.55 or less 5 \$9.56 - \$19.09 4 \$19.10 - \$28.64 3 \$28.65 - \$38.18 2 \$38.19 - \$47.73 1 \$47.74 or more 0	5	N/A	N/A
19.	OP	<u>Proposed Cost per Service Hour</u> Points \$18.60 or less 5 \$18.61 - \$37.20 4 \$37.21 - \$55.81 3 \$55.82 - \$74.41 2 \$74.42 - \$93.01 1 \$93.02 or more 0	5	N/A	N/A
20.	OP/CAP	<u>Is the project's proposed seat utilization rate reasonable given the service proposed and the need for physical distancing due to COVID-19? Despite potential constraints due to COVID-19, does the applicant demonstrate efforts and exhibit strategies to improve the proposed project's seat utilization rate over time?</u>	5	N/A	5
19.	CAP	<u>Proposed Service Hours/Week</u> Points Over 35 hours per week 5 31 to 34 4 27 to 30 3 23 to 26 2 20 to 22 1 0 to 19 hours per week 0	N/A	N/A	5
18.	MM	How appropriate are the applicant's proposed performance indicators in evaluating the effectiveness of the proposed project? Does the applicant describe measurable outcomes?	N/A	5	N/A
19.	MM	How effective are the applicant's proposed methodologies for ongoing monitoring and evaluation of the project?	N/A	5	5
18.	CAP				
20.	MM	How effective are the applicant's proposed corrective actions to be taken if original goals are not achieved?	N/A	5	N/A
Project Proposal Total Points			70	70	70
Organization Application + Project Proposal Total Points			100	100	100

Past Performance Adjustment

Past Performance Adjustment

If the applicant has held a specialized transportation grant from SANDAG in the past three years, their performance in operating and managing the most recent 12-month period of those grants will be used to determine if an adjustment (-10% to 2%) to the total score is appropriate. No adjustments will be made for applicants who have not had an active grant in the past three years.

SANDAG staff uses the Monitoring Checklist, which includes the three indicators below, to determine the past performance adjustment. The first two indicators will receive a score ranging from -2.5% to + 5%. The last indicator, project management, will receive a score ranging from (-5% to +1%). For those applicants with more than one existing grant of varying project types, an average of the performance indicator scores will be used by project type weighted by the full cost of each project. For example, if an applicant has two mobility management and three operating projects, the applicant would receive two past performance adjustment scores: the first, an average of the two performance criteria scores for the mobility management projects, and the second, an average of the three performance criteria scores for the operating projects. If an applicant has two projects within the same project type with different full costs, then the average of the scores would be weighted based on the projects' full costs (grant award plus minimum match required). For example, if the full costs of an applicant's two existing, operating projects are \$400,000 and \$100,000, respectively, then 80% of the score will be calculated from the applicant's first project and 20% from the second. If an organization applies for funding for a project type for which it does not have an existing grant, then no past performance adjustment will be applied. For example, if an applicant has an existing operating project, but only applies for funding for a mobility management project, then a past performance adjustment would not be applied from the operating project to the proposed mobility management project.

1. Cost per unit of service delivered (The unit of service to be delivered by a project is identified in the project scope of work. A unit of service can be one-way passenger trips, web hits, or referrals, etc.)*

More than 10 % under proposed cost per unit (+.5%)
Within 10% (+/-) of proposed cost per unit (0%)
10 – 15 % over proposed cost per unit (-.5%)
15 – 20% over proposed cost per unit (-1.0%)
20 – 25% over proposed cost per unit (-1.5%)
25 – 30% over proposed cost per unit (-2.0%)
30% or more over proposed cost per unit (-2.5%)

*For projects performed during the COVID-19 pandemic, staff would measure cost per unit of service delivered between March 1, 2019 to February 29, 2020 in comparison to the proportional cost per unit for that period identified in the project scope of work. No past performance adjustment would be applied for projects that started on or after March 1, 2020 due to the stay-at-home order.

2. Number of units of service delivered*

More than 10 % over proposed number of units of service (+.5%)
Within 10% (+/-) of proposed number of units of service (0%)
10 – 15 % under proposed number of units of service (-.5%)
15 – 20% under proposed number of units of service (-1.0%)
20 – 25% under proposed number of units of service (-1.5%)
25 – 30% under proposed number of units of service (-2.0%)
30% or more under proposed number of units of service (-2.5%)

3. * For projects performed during the COVID-19 pandemic, staff would measure the number of units delivered between March 1, 2019 to February 29, 2020 in comparison to the proportion of units delivered for that period identified in the project scope of work. No past performance adjustment would be applied for projects that started on or after March 1, 2020 due to the stay-at-home order. Project Management – How well did the grantee manage their project? (-5% to +1 %)

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Project Management will be evaluated based on SANDAG's observations of the grantees operation and management including, but not limited to, the following:

- Scope of Performance
- Project Management
- Insurance
- Cost Principles/Financial management
- Records
- Project schedule
- Invoicing and Reporting
- Title VI and ADA Compliance
- Outreach