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TRANSPORTATION COMMITTEE AGENDA

Friday, September 2, 2011
9 a.m. to 12 noon
SANDAG Board Room
401 B Street, 7th Floor
San Diego

AGENDA HIGHLIGHTS

- **FINDINGS AND RECOMMENDATIONS OF THE CITY OF SAN DIEGO FY 2010 *TransNet* FISCAL AND COMPLIANCE AUDIT**
- **SPECIALIZED TRANSPORTATION GRANT PROGRAMS PERFORMANCE REVIEW AND EVALUATION CRITERIA REVISIONS**
- **2050 REGIONAL TRANSPORTATION PLAN: SUMMARY OF PUBLIC COMMENTS AND PROPOSED CHANGES**

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TRANSPORTATION COMMITTEE

Friday, September 2, 2011

ITEM #		RECOMMENDATION
+1.	APPROVAL OF JULY 15, 2011, MEETING MINUTES	APPROVE
2.	PUBLIC COMMENTS/COMMUNICATIONS/MEMBER COMMENTS	
<p>Members of the public shall have the opportunity to address the Transportation Committee on any issue within the jurisdiction of the Committee that is not on this agenda. Anyone desiring to speak shall reserve time by completing a "Request to Speak" form and giving it to the Clerk prior to speaking. Public speakers should notify the Clerk if they have a handout for distribution to Committee members. Public speakers are limited to three minutes or less per person. Committee members also may provide information and announcements under this agenda item.</p>		
CONSENT (3)		
+3.	SOCIAL SERVICES TRANSPORTATION ADVISORY COUNCIL MEMBERSHIP APPOINTMENTS (Brian Lane)	APPROVE
<p>The California Public Utilities Code Section 99238 requires one-third of the members of Social Services Transportation Advisory Council to be appointed each year. The Transportation Committee is asked to approve the reappointment of six members to the Social Services Transportation Advisory Council.</p>		
REPORTS (4 through 7)		
+4.	FINDINGS AND RECOMMENDATIONS OF THE CITY OF SAN DIEGO FY 2010 <i>TransNet</i> FISCAL AND COMPLIANCE AUDIT (Steven Dobrenen, Mayer Hoffman McCann P.C.; Lisa Kondrat-Dauphin)	INFORMATION
<p>In accordance with the <i>TransNet</i> Extension Ordinance, the Independent Taxpayer Oversight Committee (ITOC) has the responsibility to conduct the annual fiscal and compliance audits of <i>TransNet</i> recipients. On July 13, 2011, the ITOC reviewed the findings and recommendations of the City of San Diego FY 2010 <i>TransNet</i> Fiscal and Compliance Audit as conducted by the certified public accounting firm of Mayer Hoffman McCann and approved it for issuance. Staff will present the audit findings and recommendations.</p>		
+5.	SPECIALIZED TRANSPORTATION GRANT PROGRAMS PERFORMANCE REVIEW AND EVALUATION CRITERIA REVISIONS (Brian Lane)	APPROVE
<p>The Transportation Committee is asked to approve the New Freedom and Job Access and Reverse Commute evaluation and scoring criteria for the 2011-2012 competitive grant process (federal fiscal year [FFY] 2011 funding). The Transportation Committee also is asked to authorize staff to issue a call for projects for FFY 2011 JARC and New Freedom funding.</p>		

- +6. 2050 REGIONAL TRANSPORTATION PLAN: SUMMARY OF PUBLIC COMMENTS AND PROPOSED CHANGES (Heather Adamson) RECOMMEND

On April 22, 2011, the Board of Directors accepted the Draft 2050 Regional Transportation Plan (RTP) and its Sustainable Communities Strategy (SCS) for public distribution and comment. The public comment period for the Draft 2050 RTP and its SCS closed on July 8, 2011. Staff will provide a summary of the comments received and an overview of the proposed changes to the Draft 2050 RTP. The Transportation Committee is asked to recommend that the Board of Directors accept the proposed modifications to the Draft 2050 RTP and its SCS in substantially the same form as presented in the report. The proposed changes will be considered in the Final 2050 RTP and its SCS, and evaluated in the Final Environmental Impact Report prior to Board adoption scheduled on October 28, 2011.

- +7. RESULTS OF THE 2009 ONBOARD TRANSIT PASSENGER SURVEY (Brian Lane) INFORMATION

This report presents information from the latest Onboard Passenger Survey. Between April 2009 and December 2009, SANDAG surveyed passengers onboard all fixed transit routes, asking questions regarding trip behaviors and demographics. The results are used for transportation modeling, Federal Transit Administration reporting, and as a tool for transit planning.

- 8. UPCOMING MEETINGS INFORMATION

The next meeting of the Transportation Committee is scheduled for September 16, 2011, at 9 a.m.

- 9. ADJOURNMENT

+ next to an agenda item indicates an attachment

TRANSPORTATION COMMITTEE

September 2, 2011

AGENDA ITEM NO.: **5**

Action Requested: APPROVE

SPECIALIZED TRANSPORTATION GRANT PROGRAMS PERFORMANCE
REVIEW AND EVALUATION CRITERIA REVISIONS

File Number 3320200

Introduction

SANDAG manages three competitive grant programs for specialized transportation projects and services: the Job Access and Reverse Commute (JARC) program aimed at transportation for reverse commuters and employment-related transportation for persons of limited means; the New Freedom program focused on transportation for persons with disabilities; and the Senior Mini-Grant program funding specialized transportation services for seniors whose special needs cannot be met by conventional transit or the parallel Americans with Disabilities Act (ADA) paratransit service. The JARC and New Freedom programs are funded by the Federal Transit Administration (FTA) and the Senior Mini-Grant is funded through *TransNet*.

Recommendation

The Transportation Committee is asked to approve the New Freedom and Job Access and Reverse Commute evaluation and scoring criteria for the 2011-2012 competitive grant process (federal fiscal year [FFY] 2011 funding). The Transportation Committee also is asked to authorize staff to issue a call for projects for FFY 2011 JARC and New Freedom funding.

All three programs require that SANDAG conduct a competitive selection process to distribute the funds. The first set of awards under the JARC and New Freedom projects were made in February 2007 and Senior Mini-Grant programs were first awarded in September 2008. There have been multiple subsequent cycles for each of these programs. Some of the first grantees have completed their projects, while other successful programs are moving into the final years of their multiyear contracts. This report provides an opportunity for the Transportation Committee to review the performance of projects funded under all three competitive grant programs and to consider adjustments to the evaluation and scoring criteria based upon performance for JARC and New Freedom.

Discussion

Proposed Changes to Program Requirements and Evaluation Criteria

The JARC, New Freedom, and Senior Mini-Grant program requirements and evaluation criteria have evolved over time based on program experience. After each competitive selection cycle, adjustments have been made to the evaluation criteria, their weighting and other program requirements to respond to lessons learned, comments made by the Transportation Committee, as well as new federal requirements. The most recent evaluation criteria were adopted in spring 2010 to evaluate grants that were finalized in February 2011.

Similarly, as the evaluation criteria have evolved over time, so too has the performance monitoring for these programs evolved. Attachment 1 includes a brief description and status of each funded project that was active in the last year. Attachment 2 includes a further statistical summary of each project that was active in the last year and a brief summary of the data. This assessment was reviewed by SSTAC in March 2011 and the Senior Mini-Grant portion was reviewed by the Independent Taxpayer Oversight Committee (ITOC) in April 2011. Through this process SANDAG staff and ITOC recognized the need to incorporate the performance of existing grantees into the evaluation of projects to be funded in subsequent award cycles. Most recipients are meeting their performance targets or very close. Staff is working with any recipients that have missed their targets in order to improve their performance.

SANDAG staff worked with a subcommittee of SSTAC to discuss the issue and to develop a proposed methodology to incorporate the past performance of grantees in the final scoring and ranking of projects for grant funding. The subcommittee of SSTAC was composed of social service transportation stakeholders, including representatives of transit riders and applicant agencies (transit operators, the Consolidated Transportation Service Agency (CTSA), and social service transportation providers). The subcommittee met several times between May and July 2011 to draft a set of proposed changes. These proposed changes are summarized in Attachments 3 and 4. The proposed changes were discussed by the SSTAC at the July 18, 2011, meeting and the committee was supportive of the proposal which is summarized below:

1. *Past Performance Criteria* - If an applicant has held a JARC, New Freedom, or Senior Mini-Grant award 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 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. A bonus of up to 2 percent of the total points awarded may be added to the score if the past performance of the applicant exceeds the performance commitments made in the original grant proposal. If the performance of the grantee has been less than the level originally proposed in the application and grant agreement, the total score on the current application may be reduced by up to 10 percent.
2. *Grant Minimum/Maximum Amounts* - Initially, SANDAG did not set grant minimum or maximum amounts for any of these grant programs resulting in a wide range of grant funding amounts. With the most recent Senior Mini-Grant program cycle, SANDAG set the grant minimum amount at \$30,000 and the grant maximum amount at \$200,000. The recommended change is to apply these same minimum and maximum amounts to the JARC and New Freedom program. The lower limit is designed to avoid grants that would cost more to administer than they are actually worth. The upper limit, which is about 20 percent of total amount of money available in any one program per year, is designed to ensure that the money is available to a variety of projects and not concentrated in just one or two grants. The upper limit is consistent with JARC and New Freedom grants administered by Caltrans.
3. *Needs Accommodation Policy* - The FTA regulations for the JARC and New Freedom programs allow the funds to be used to transport some persons who are not in the target population (e.g. not disabled, or not of limited means, or not reverse commuters). The regulations do not specify what percentage of other users is acceptable; however a maximum of 20 percent of nontarget riders appears to be consistent with the intent of the regulation. In 2010 this issue was addressed for the Senior Mini-Grant program and a limit of 20 percent non-seniors was agreed to by SSTAC, ITOC, and the SANDAG Transportation Committee. In the past SANDAG exempted the local transit agencies from the 80 percent rule because current data for the existing route structure did not exist. With the completion of the 2009 Onboard Transit Passenger Survey, data is now available. The proposed changes include applying the general

rules from the Senior Mini Grant program to JARC and New Freedom. To ensure the integrity of the program is maintained, three requirements must be met for projects funded through these programs:

- The program is specifically designed to meet the special needs of the target population;
- The target population accounts for at least 80 percent of total ridership; and
- Trip priority is given to the target population.

Evaluation Process

Project submittals for all three programs are evaluated and ranked by external evaluation committees made up of experts in the field of specialized transportation, including transportation consultants, staff from social service transportation providers and other regional transportation planning agencies. In order to determine the new performance adjustment factor, SANDAG staff would use the data collected from agencies along with information compiled throughout the grantees reporting and site visits. The adjustment factor would be applied to the final score and to assemble a final ranked list. The final ranked list would then be used to determine funding recommendations based on the amount of funding projected to be available.

Proposed Schedule for FFY 2011 Competitive Process

The proposed schedule for the competitive process and grant award for the fall competitive cycle to distribute FFY 2011 JARC and New Freedom funding is shown below:

Activity	Anticipated Date
Transportation Committee considers Job Access and Reverse Commute and New Freedom evaluation scoring criteria	September 2, 2011
Grant application workshops	Oct-Nov 2011
Selection of evaluation committee by SANDAG staff	November 21, 2011
Final proposal applications due	Mid-December 2011
Project award summary to advisory committees and working groups	January 2012
Transportation Committee considers funding recommendations for Board of Directors	January 20, 2012
Board of Directors considers approval of funding recommendations	February 24, 2012

CHARLES "MUGGS" STOLL

Director of Land Use and Transportation Planning

- Attachments:
1. Summary of Active JARC, New Freedom, and Senior Mini-Grant Projects
 2. Active JARC, New Freedom, and Senior Mini-Grant Project Cost-Effectiveness Tracking
 3. FFY 2011 New Freedom Project Evaluation and Scoring Criteria
 4. FFY 2011 JARC Project Evaluation and Scoring Criteria

Key Staff Contact: Brian Lane, (619)699-7331, bla@sandag.org

Summary of FY 2011 Senior Mini-Grant Projects/Programs

The ridership and budget data provided in the summaries are based on information provided by the grant recipients since the service was started. Since all of the services did not begin operations in the same month, the number of months of data will vary by project and by the date on which invoices and progress reports are submitted. Please refer to Attachment 3 for statistical breakdown of performance tracking.

1. All Congregations Together (ACT) ComLink Transportation Project

This project was awarded up to \$520,733 in Senior Mini-Grant funding for three years of service. This program provides a shuttle service for nonemergency medical and social trips for residents of five senior communities in Chula Vista and National City, using a volunteer resident from each community to coordinate trips. Predominately two of the five senior centers utilize the transportation service, although ACT has extensively marketed the service to all five centers.

2. Alpha Project Senior Transportation Program

This program provides transportation to low-income seniors in downtown San Diego and North County communities of Oceanside and Escondido and was awarded up to \$587,418 in Senior Mini-Grant funding through the first, second, and third year.

3. City of La Mesa Rides4Neighbors Program

This program includes a volunteer driver program, senior shuttle service, taxi scrip program, and travel training program serving the City of La Mesa and neighboring communities, including Mt. Helix, Spring Valley, parts of El Cajon and Lemon Grove, San Carlos and Del Cerro. This program was awarded up to \$240,000 in Senior Mini-Grant funding for three years.

4. City of Oceanside Solutions for Seniors on the Go Program

The City of Oceanside Seniors on the Go program offers three options to facilitate the transportation needs of seniors: curb-to-curb subsidized taxi scrip sales, door-to-door shuttle transportation, and door-through-door volunteer driver and destination assistance transportation. This program was awarded up to \$638,915 in Senior Mini-Grant funding for three years of service.

5. City of Vista Out & About Program

The Out & About Vista program is a two-part service: a Senior Shuttle that provides door-to-door service and a volunteer driver component that utilizes volunteers in the community to provide transportation in privately owned vehicles. This program was awarded up to \$76,464 in Senior Mini-Grant funding for one year of operations.

6. ElderHelp Volunteer Driver Program

Elderhelp's Senior a Go Go program provides a volunteer driver service to low-income seniors in the Mid-City area of San Diego. This program was awarded three years of Senior Mini-Grant funding, totaling \$345,937. ElderHelp is currently working to reduce project

costs by restructuring staff responsibilities and improving ridership through more focused marketing efforts.

7. Full Access and Coordinated Transportation (FACT) Senior Ride Reimbursement Program

The FACT Senior Ride Reimbursement program subsidizes rides for seniors in the Ramona area and San Diego Country Estates through a private provider, Sol Transportation. Service is available on Tuesdays and Thursdays from 9 a.m. to 5 p.m., and rides must be scheduled the day before. The very first rides funded by this grant were provided in October 2010. FACT is currently working to increase ridership through the distribution of flyers in both English and Spanish and other marketing strategies.

8. Jewish Family Services Rides & Smiles Program

Jewish Family Services (JFS) uses its Senior Mini-Grant to fund a portion of its North County Inland Rides & Smiles Program, an innovative, primarily volunteer-based transportation service. Volunteer drivers provide rides utilizing their personal vehicles. JFS reimburses mileage and provides secondary auto insurance. JFS was awarded up to \$228,774 in Senior Mini-Grant funding for three years of service.

9. North County Transit District (NCTD) Mobility/Travel Training Program

This program was awarded up to \$200,065 in funding to provide three years of Mobility/Travel training. The training programs help individuals learn how to use the NCTD Rider's Guide and its contents, create and plan travel options, navigate the NCTD transit system, and maneuver mobility devices on and off public transit vehicles.

10. Peninsula Shepherd Senior Center

Peninsula Shepherd Senior Center offers a volunteer driver program and a weekly shuttle service to ambulatory seniors living in the Peninsula communities of Point Loma, Ocean Beach and Midway/Sports Arena. Peninsula Shepherd Senior Center was awarded up to \$131,701 in Senior Mini-Grant funding to provide three years of service.

11. Redwood Elderlink's Out & About Program

This program is the senior transportation service arm of the Redwood Senior Homes and Service, providing a medical and shopping shuttle service, which operates at full capacity, and a supplemental taxi service for persons with an immediate need. The Out & About program was awarded up to \$156,009 in Senior Mini-Grant funding for three years of service.

12. Traveler's Aid Society

Traveler's Aid SenioRide program offers accessible shuttle rides, a volunteer driver program, and a taxi scrip program to close to 400 program participants for medical appointments, social events, personal appointments, and errands. The program was awarded up to \$290,299 in Senior Mini-grant funding for three years of service.

Summary of FY 2011 New Freedom Projects/Programs

1. **City of La Mesa – Rides4Neighbors**

This project was awarded \$240,000 in funding for continued operations and expansions of a volunteer driver transportation service. The geographical area expanded beyond the City of La Mesa boundaries to include unincorporated areas outside the La Mesa city limits, including Mt. Helix, Spring Valley, parts of El Cajon and Lemon Grove, San Carlos, and Del Cerro. In January 2009 the project launched the Discount Taxi Scrip component after hiring a part-time clerical assistant. In collaboration with Yellow Cab, the project purchases scrip booklets worth \$20 of taxi service and sells to qualified older adults and persons with disabilities for \$10 per booklet.

2. **FACT – Mobility Management**

The FACT Mobility Management project includes the development and maintenance of a centralized transportation center to provide information and referral services, and eventually broker trips. Throughout the grant, FACT provided information and referral services for any individual requesting those services and additionally created and updated a business plan and investigated software options to begin laying the groundwork for an expanded role of fully coordinating transportation services in the region.

3. **FACT – STRIDE Database Update**

The FACT STRIDE database update is another component in FACT's effort to implement a fully coordinated transportation system in the region. The database is used by both FACT staff when providing information and referral services, and also is available to the public via the STRIDE website. This project included an effort to ensure all database entries were up to date and additional outreach to the faith-based transportation providers for inclusion in the database.

4. **Jewish Family Services – UC Rides & Smiles**

Jewish Family Services (JFS) was awarded New Freedom funding to begin a new branch of its Rides & Smiles program in the University City community. The Rides & Smiles program is an innovative, primarily volunteer-based transportation service originally operated in the North County Inland area of San Diego County. Volunteer drivers provide rides utilizing their personal vehicles; JFS reimburses mileage and provides secondary auto insurance. This project was awarded \$47,097 in funding for one year of service.

5. **NCTD – Mobility/Travel Training**

This program was awarded \$334,330 in New Freedom funding to support the Mobility/Travel Training program to improve the transportation options for people with disabilities in northern San Diego County. The training programs help individuals learn how to use the NCTD Rider's Guide and its contents, create and plan travel options, navigate the NCTD transit system, and maneuver mobility devices on and off public transit vehicles.

6. NCTD – Bus Stop Improvement/Path of Travel Accessibility Program

NCTD’s Bus Stop/Path of Travel Accessibility Program includes a comprehensive update to NCTD’s database of bus stop information. The project was awarded \$146,778 in New Freedom funding to update the information about 2,200 bus stops. The new information to be collected would include accessibility information and adjacent paths of travel in NCTD’s service area. This information will be available online, improving the trip-planning abilities of individuals with limited mobility, increasing their mobility options and independence.

7. Accessible San Diego - Tourism Transportation Information Network

Accessible San Diego is an information Center for Visitors and San Diegans with disabilities that provide accessible public transit and paratransit information to people with disabilities and seniors, thereby promoting and increasing the use of public transportation by this rapidly growing segment of population/riders. This project was awarded \$132,960 in funding for a one year project. SANDAG withheld payment of the final invoice as all tasks were not completed as described in the scope of work provided by Accessible San Diego in their grant application.

Summary of FY 2011 Job Access & Reverse Commute Projects

1. Metropolitan Transit System (MTS) – Route 905

MTS Route 905 was awarded \$1,356,380 in JARC funding for three years of operations. Route 905 operates between the Otay Mesa Border Crossing and the Iris Avenue Trolley station. It is a fixed-route service operating with standard coaches. On weekdays, it operates with a base 30-minute frequency and improves to 15-minute frequencies in the AM and PM peak periods. On weekends, it operates with 30-minute service all day. Overall, 85 weekday one-way trips and 27 weekend one-way trips are operated. Service is provided between the Iris Avenue Trolley station and the Otay Mesa Border Crossing via State Route (SR) 905, and the industrial areas in Otay Mesa along Siempre Viva Road, Airway Road, and surrounding streets.

2. MTS – Route 960

MTS Route 960 was awarded \$304,827 in JARC funding for three years of operations. Route 960 operates between the Euclid Avenue Trolley station and University Towne Centre via Mid-City, Kearny Mesa, and University City. It is a fixed-route service operated with standard coaches and operates only on weekdays and only in the peak hours. Overall, 14 weekday one-way trips are operated. Heading north, service is provided between the Euclid Avenue Trolley station and the Mid-City Transit Plazas (University Avenue and El Cajon Boulevard) via SR 94 and SR 15. Continuing north, the route operates on I-15 to Balboa Avenue, Kearny Villa Road, Clairemont Mesa Boulevard, and Ruffin Road, before heading west on SR 52 and north on I-805 to the La Jolla/University City area. Route 960 finishes its trips by serving Nobel Drive, Judicial Drive, Golden Haven Drive, Towne Centre Drive, Executive Drive, and Genesee Avenue before entering University Towne Centre (UTC).

3. MTS – Route 30

MTS Route 30 was awarded \$1,137,957 in JARC funding for three years of operations. Route 30 operates between downtown San Diego and UTC via Old Town, Pacific Beach, La Jolla, and University of California, San Diego (UC San Diego). On weekdays, it operates with a 15-minute frequency, and on weekends (JARC-funded) it operates with 30-minute service all day. It is a fixed-route service operated with standard coaches. Overall, 75 weekend one-way trips are operated. Service is provided between downtown San Diego, Old Town, and Pacific Beach on Interstate 5. The remainder of the route uses local streets through Pacific Beach, La Jolla, UC San Diego, and University City. Late-night trips serve residential communities south of La Jolla Village Drive.

4. NCTD – SPRINTER Weekend Service

On Saturday, July 12, 2008, NCTD began providing enhanced weekend and holiday service for the SPRINTER light rail service. This service improves access for workers with nontraditional job schedules and provides more convenient connections for workers in northern San Diego County who transfer between SPRINTER and the hourly bus routes on weekends when service is less frequent. This enhanced service being funded by this JARC grant increases the frequency on weekends and holidays from hourly service to every 30 minutes between the hours of 10 a.m. and 6 p.m. (approximately). NCTD contracts with Veolia for provision of SPRINTER service. NCTD was awarded \$469,126 in JARC funding to operate 30-minute service on weekends and holidays for three years.

Job Access & Reverse Commute

MTS - ROUTE 905	Proposal	Actual		
		7/1/07 - 6/30/08	7/1/08 - 6/30/09	7/1/09 - 6/30/10
Cost	\$1,416,432.00	\$906,516.00	\$904,658.00	\$901,586.00
Trip	415,121	418,817	415,079	404,576
Cost/Trip	\$3.41	\$2.16	\$2.18	\$2.23

MTS - ROUTE 960	Proposal	Actual		
		7/1/07 - 6/30/08	7/1/08 - 6/30/09	7/1/09 - 6/30/10
Cost	\$315,829.00	\$222,028.00	\$222,860.00	\$223,874.00
Trip	93,300	105,724	100,445	78,395
Cost/Trip	\$3.39	\$2.10	\$2.22	\$2.86

MTS - ROUTE 30	Proposal	Actual		
		7/1/07 - 6/30/08	7/1/08 - 6/30/09	7/1/09 - 6/30/10
Cost	\$880,802.00	\$740,016.00	\$758,632.00	\$777,266.00
Trip	305,664	381,700	474,687	386,868
Cost/Trip	\$2.88	\$1.94	\$1.60	\$2.01

NCTD - SPRINTER	Proposal	Actual		
		1/1/08 - 6/30/08	7/1/08 - 6/30/09	7/1/09 - 6/30/10
Cost	\$450,653.33	\$156,375.33	\$312,750.67	\$312,750.67
Trip	158,543	139,139	392,393	359,780
Cost/Trip	\$2.84	\$1.12	\$0.80	\$0.87

Data Summary
MTS has operated the last three years of its Route 905 JARC project at a lower cost/trip than originally proposed.

Data Summary
MTS has operated the last three years of its Route 960 JARC project at a lower cost/trip than originally proposed.

Data Summary
MTS has operated the last three years of its Route 30 JARC project at a lower cost/trip than originally proposed.

Data Summary
NCTD has operated the last three years of its SPRINTER project at a lower cost/trip than originally proposed.

For all projects, the actual costs reported represent the JARC Grant portion plus the required match amount.

New Freedom

City of La Mesa	Proposal	Actual	
		1/1/2009 - 12/31/2009	1/1/2010 - 12/31/2010
Cost	\$76,500.00	\$115,659.46	\$140,946.94
Trip	4,000	8,883	7,311
Cost/Trip	\$19.13	\$13.02	\$19.28

Performance Summary
The City of La Mesa is currently performing slightly above its proposed cost/trip of \$19.13. However, they have met a decrease in cost/trip to \$23.64 over the past year.

FACT - Mobility Management	Proposal	Actual		
		11/1/2008 - 10/31/2009	11/1/2009 - 10/31/2010	11/1/2010 - 5/31/2011
Cost	\$145,384.85	\$3,893.64	\$6,291.45	\$7,339.95
Referrals	36,413	284	451	526
Cost/Trip	\$3.99	\$13.71	\$13.95	\$13.95

Performance Summary
FACT is currently operating above the proposed cost/trip. The program did not record referrals until July 2009 which explains for the high cost/referral of \$1,201.92. It should be noted cost/trip is declining.

FACT - STRIDE	Proposal	Actual		
		6/1/2008 - 5/31/2009	6/1/2009 - 5/30/2010	6/1/2010 - 12/31/2010
Cost	\$133,759.00	\$61,812.50	\$12,305.28	\$48,152.04
HITS	74,000	0	14,898	10,516
Cost/Trip	\$1.81	\$0.00	\$0.83	\$4.58

Performance Summary
STRIDE website did not record hits due in the first year due to ongoing edits/updates. Over the course of the STRIDE project with recorded data, the average cost/web hit was \$2.38.

Jewish Family Services	Proposal	Actual
		11/1/2009 - 11/30/2010
Cost	\$104,143.00	\$83,623.00
Trip	2,200	5,045
Cost/Trip	\$47.34	\$16.58

Performance Summary
JFS completed the project well below the proposed cost/trip.

NCTD - Travel Training	Proposal	Actual	
		7/1/2009 - 6/30/2010	7/1/2010 - 12/31/2010
Cost	\$417,913.42	\$56,976.53	\$63,545.21
Trainees	3,800	1,563	1,108
Cost/Individual Trained	\$109.98	\$36.45	\$57.35

Performance Summary
NCTD has operated well below its proposed cost/individual trained at \$45.12.

NCTD - Bus Stop	Proposal	Actual	
		7/1/2008 - 6/30/2009	7/1/2009 - 6/30/2010
Cost	\$216,139.31	\$120,667.00	\$95,472.31
	-	-	-
	\$0.00	\$0.00	\$0.00

Performance Summary
This NCTD project has no statistical data that is reported to track performance. There is a database of 2,200 bus stops for improvements.

Accessible San Diego	Proposal	Actual
		7/1/2009 - 6/30/2010
Cost	\$166,200.07	\$140,946.94
Referrals	281,695	10,000
Cost/Referral	\$0.59	\$14.09

Performance Summary
To date, Accessible San Diego is currently operating above its proposed cost/referral of \$0.18 at a reported \$14.09 cost/referral. Payment of the final invoice was withheld due to some incomplete work tasks.

For all projects, the actual costs reported represent the New Freedom Grant portion plus the required match amount.

Senior Mini-Grant

Jewish Family Services	Proposal*	Actual	
		2/1/2009 - 1/31/2010	2/1/2010 - 1/31/2011
Cost	\$113,428.40	\$90,246.35	\$95,885.63
Trip	4,500	5,997	8,938
Cost/Trip	\$25.21	\$15.05	\$10.73

Performance Summary
Jewish Family Services Rides & Smiles has averaged a cost/trip of \$12.46 during the first two years of Senior Mini-Grant funding, less than originally proposed.

NCTD	Proposal*	Actual	
		1/11/2009 - 1/31/2010	2/1/2010 - 12/31/2010
Cost	\$145,603.99	\$99,795.57	\$42,140.83
Units	1,000	911	2,215
Cost/Unit	\$145.60	\$109.55	\$19.03

Performance Summary
NCTD averaged a cost of \$28.38 per individual trained during the first two years of the Senior Mini-Grant project, less than original proposed.

Redwood Elderlink	Proposal*	Actual	
		4/1/2009 - 3/31/2010	4/1/2010 - 3/31/2011
Cost	\$83,003.00	\$57,169.90	\$72,825.10
Trip	3,380	1,873	4,013
Cost/Trip	\$24.56	\$30.52	\$18.15

Performance Summary
Despite initially operating above their proposed cost/trip, Redwood Elderlink has demonstrated efficiency improvements and averaged \$18.15 in the second year, less than originally proposed.

ACT	Proposal*	Actual	
		5/12/09 - 4/31/2010	5/1/2010 - 4/30/2011
Cost	\$198,596.00	\$125,052.45	\$140,787.28
Trip	14,400	809	2,717
Cost/Trip	\$13.79	\$154.58	\$51.82

Performance Summary
SANDAG staff has met with ACT to express concerns, and ACT has responded by exploring a restructuring of the project, changes in service delivery, and expanded outreach. The project has shown recent reductions in cost/trip operating at \$38.62 in the month of June. SANDAG staff will continue to closely monitor this program.

Alpha Project	Proposal*	Actual	
		6/1/2009 - 5/31/2010	6/1/2010 - 5/30/2011
Cost	\$244,757.00	\$214,194.59	\$298,156.78
Trip	18,000	8,758	16,259
Cost/Trip	\$13.60	\$24.46	\$18.34

Performance Summary
Alpha Project substantially increased the number of trips provided in their second year of service. Based on current trends, it is expected they will reach the proposed cost/trip in their third year of service.

City of La Mesa	Proposal*	Actual	
		2/1/2009 - 12/31/2009	1/1/2010 - 12/31/2010
Cost	\$199,939.00	\$17,834.03	\$58,880.18
Trip	9,350	7,971	7,311
Cost/Trip	\$21.38	\$2.24	\$8.05

Data Summary
The City of La Mesa has averaged a cost/trip of \$5.02 during the first two years of Senior Mini-Grant funding, less than originally proposed.

City of Oceanside	Proposal*	Actual	
		7/1/2009 - 6/30/2010	7/1/2010 - 6/30/2011
Cost	\$217,315.80	\$78,936.93	\$221,437.66
Trip	14,712	5,316	13,118
Cost/Trip	\$14.77	\$14.85	\$16.88

Data Summary
The City of Oceanside has averaged a cost/trip of \$16.29, slightly above originally proposed.

ElderHelp	Proposal*	Actual	
		1/1/2009 - 12/31/2009	1/1/2010 - 12/31/2010
Cost	\$160,776.00	\$117,093.25	\$115,498.05
Trip	7,080	1,116	1,664
Cost/Trip	\$22.71	\$104.92	\$69.41

Data Summary
 SANDAG has met with ElderHelp to express concerns over the high cost/trip. ElderHelp staff is pursuing several several changes to the project to increase efficiency. Based on some of these changes already incorporated, the cost/trip for this project has decreased to \$37.68 in the month of June. ElderHelp staff is confident further reduction will occur. SANDAG staff will continue to closely monitor the program.

FACT	Proposal*	Actual	
		4/1/2009 - 3/31/2010	4/1/2010 - 3/31/2011
Cost	\$33,600.00	\$0.00	\$6,922.80
Trips	1,200	\$0.00	197
Cost/Trip	\$37.80	\$0.00	\$35.14

Performance Summary
 FACT started the project in October due to unexpected delays. Based on the reported 6 months of operation, FACT is currently operating below the proposed cost/trip at \$35.14.

City of Vista	Proposal*	Actual	
		7/1/2009 - 6/30/2010	
Cost	\$117,580.00	\$94,809.89	
Trip	9,416	9,175	
Cost/Trip	\$12.49	\$10.33	

Performance Summary
 Based on the data reported, the City of Vista operated the project at a rate of \$10.33, lower than the proposed cost/trip. The City of Vista only applied for one year of funding, so their Senior Mini-Grant project concluded in June 2010. The City of Vista continues to operate transportation.

Peninsula Shepherd Senior Center	Proposal*	Actual	
		6/1/2009 - 5/31/2010	4/1/2010 - 3/31/2011
Cost	\$54,180.00	\$44,513.25	\$54,308.01
Trips	2,280	3,064	3,017
Cost/Trip	\$23.76	\$14.53	\$18.00

Performance Summary
 Peninsula Shepherd Senior Center has averaged a cost/trip of \$16.25 during the first two years of Senior Mini-Grant funding, less than originally proposed.

Traveler's Aid Society	Proposal*	Actual	
		4/1/2009 - 3/31/2010	4/1/2010 - 3/31/2011
Cost	\$117,951.00	\$41,061.48	\$97,832.30
Trips	15,206	2,377	6,305
Cost/Trip	\$7.76	\$17.27	\$15.52

Performance Summary
 Traveler's Aid Society is operating with a higher cost/trip than originally proposed, however, improving. It is anticipated that this project's cost/trip will continue to improve.

For all projects, the actual costs reported represent the Senior Mini-Grant portion plus the required match amount.

* The actual amounts are being compared to the proposed amounts for the first year only because that was what was used to award points during the evaluation process

New Freedom Project Evaluation and Scoring Criteria

Please note that this is a line-in / line-out version

The following information and scoring criteria are used to score and rate project applications for New Freedom funding.

Minimum Eligibility Criteria: Must answer **Yes** to each of the following four questions to be eligible.

1. Is the agency a local governmental agency (private or public), operator of public transportation, nonprofit agency, or a tribal government?

2. Will at least 80 percent of the served population consist of persons with disabilities?

3. Is the total grant request not less than \$30,000 and not more than \$200,000 per year?

4. Is your project derived from a Very High or High Priority in the 2010 – 2014 Coordinated Plan?

: Very High

→ Develop or expand transit and non-agency client transportation services in areas with little or no other transportation options based on identified gaps in transportation services included in Chapters 6 and 7; or

→ Develop or expand transportation solutions in areas with sufficient densities to support shared ride or coordinated services based on identified gaps in transportation services included in Chapters 6 and 7.

: High

→ Develop a centralized ride scheduling, dispatching, a mobility center

→ Improve transportation services to the rural areas

→ Increase coordination efforts by combining resources such as vehicles, riders, funds for rides, vehicle maintenance, drivers, driver training, insurance coverage, general ride subsidies, dispatching equipment, software, and gas cards for volunteers

→ Increase work-based weekday and weekend service based on identified gaps in service included in Chapters 6 and 7

→ Increase work-based weeknight service based on identified gaps in service included in Chapters 6 and 7

→ Provide travel training to encourage more individuals to ride regular transit

→ Develop or enhance volunteer driver programs

→ Upgrade bus stops to include weather protection

SCORING CRITERIA: The information and scoring criteria below will be used to score and rate project applications for New Freedom funding.

A. Goals and Objectives (15 points)

- Will the project serve the appropriate population? Does the proposal provide pertinent demographic data and/or maps? **(5 points)**
- Will the proposed program increase or enhance the availability of transportation for disabled individuals? **(5 points)**
- To what extent is the proposed project consistent with the goals and objectives of the New Freedom program? **(5 points)**

B. Operational/Implementation Plan (15 points)

- How thorough is the implementation plan? Does the proposal include project tasks, timelines, benchmarks, key milestones, key personnel, deliverables, and routes and schedules as applicable? Does the implementation plan and timeline seem feasible? **(5 points)**
- Does the applicant demonstrate the technical ability to manage the project? Has the applicant effectively implemented projects using federal or state funds in the recent past; has the applicant managed similar projects; has the applicant had sufficient experience in providing services for the targeted clientele? Does the agency have adequate staff to resources to handle the project? If applicable, are drivers properly trained? If applicable, does the agency display the ability to maintain vehicles? **(5 points)**
- Does this project relate to other services or facilities provided by the agency or firm? Does the operational plan correspond with the project goals/objectives? **(5 points)**

C. Program Effectiveness and Performance Indicators (20 points)

- Does the project make use of New Freedom funds in an efficient and cost effective manner? **(5 points)**
- Does the proposal describe efforts to ensure the project's cost-effectiveness (and other measurable units of service)? Will the project experience increasing efficiencies over time? If applying for a capital project, does the applicant demonstrate that the purchase is the most cost-effective product for the service being provided? **(5 points)**
- Does the proposal provide measurable performance indicators to measure and evaluate the effectiveness of the proposed project in meeting the identified goals? For capital-related projects, does the applicant establish milestones and methods for reporting the status of project delivery? **(5 points)**
- Does the applicant describe methodologies and procedures for ongoing monitoring and evaluation of the project or service, and steps to be taken if original goals are not achieved? **(5 points)**

D. Coordination and Program Outreach (15 points)

- Does the proposal describe how key stakeholders will remain involved and informed throughout the process? Did the applicant attach ~~three~~one or more letters from other agencies describing how they will be coordinating with the applicant in the provision of transportation services of support from stakeholders to the grant application? (The CTSA and public transit operators proposing a fixed-route project are exempted from submitting letters.) **(5 points)**
- How ~~thorough~~comprehensive are the applicant's proposed strategies for marketing the project and promoting public awareness? **(5 points)**
- To what extent does the project demonstrate coordination among various entities? **(5 point maximum – 1 point per type of coordination)**
 - : Shared use of vehicles
 - : Dispatching or scheduling
 - : Maintenance
 - : Back up transportation
 - : Staff training programs
 - : Joint procurement of services and supplies
 - : Active participation in local social service transportation planning process
 - : Coordination of client trips with other transportation agencies

E. Project Budget (15 points)

- Was a clearly defined budget submitted for the proposed project? **(5 points)**
- Does the project appear to be feasible as described? **(5 points)**
- Is the source of local share stable? **(5 points)**

F. Sustainability (10 points)

- Does the applicant demonstrate a long-term commitment to the project to continue the effort beyond the availability of the requested grant resources? Is this applicant financially capable of sustaining operations after the initial grant funding is expended? **(5 points)**
- Does the applicant provide sufficient justification as to why New Freedom funding is needed for this project? **(5 points)**

G. Innovation (10 points)

- Is the proposed project an innovative solution to addressing the need, and could the innovations be applied to other services in the region? **(5 points)**

- Are there elements of the project that are environmental sustainable (including the use of alternative fuels and clean air vehicles)? (5 points)

H. Past Performance (-10% to +2 % adjustment to total point score)

If the applicant has held a JARC, New Freedom, or Senior Mini-Grant award 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 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.

The following four indicators will be used to determine the past performance adjustment. The data used for the first two indicators will be compared to the original proposals submitted, while the last two will be based on ongoing project evaluations and onsite assessment visits. Each category will receive a score ranging from -2.5% to +.5%. For those applicants with more than one existing grant, an average of the performance criteria scores will be used.

1. Cost per unit of service delivered (A unit 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 % or more over proposed cost per unit (-.5%)
- 15 – 20% or more over proposed cost per unit (-1.0%)
- 20 – 25% or more over proposed cost per unit (-1.5%)
- 25 – 30% or more over proposed cost per unit (-2.0%)
- 30% or more over proposed cost per unit (-2.5%)

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 % or more under proposed number of units of service (-.5%)
- 15 – 20% or more under proposed number of units of service (-1.0%)
- 20 – 25% or more under proposed number of units of service (-1.5%)
- 25 – 30% or more under proposed number of units of service (-2.0%)
- 30% or more under proposed number of units of service (-2.5%)

3. Project Management – How well did the grantee manage their project? (-2.5% to +.5 %)

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

- Budget management
- Administration costs
- Coordination
- Service area adherence
- Project schedule
- Invoice and report quality and consistency

4. Service Quality – Did the grantee provide a quality service? (-2.5% to +.5 %)

Service Quality will be based on written evaluations prepared by SANDAG during onsite visits to the grantee including, but not limited to, the following:

- Customer Satisfaction
- Safety
- Training
- Outreach
- Quality Control Measures

Job Access and Reverse Commute (JARC) Project Evaluation and Scoring Criteria

Please note that this is a line-in / line-out version

The following information and scoring criteria are used to score and rate project applications for JARC funding.

Minimum Eligibility Criteria: Must answer **Yes** to each of the following four questions to be eligible.

-
1. Is the agency a local governmental agency, (private or public) operator of public transportation, nonprofit agency, or a tribal government?
 2. Will at least 80 percent of the riders be considered as traveling either (can combine riders from both categories for 80 percent minimum):
 - to employment and employment related services for welfare recipients and eligible low-income individuals, or
 - from urbanized areas and nonurbanized areas to suburban employment opportunities.
 - ~~1.3.~~ Is the total grant request not less than \$30,000 and not more than \$200,000 per year?
 - ~~2.4.~~ Is your project derived from a Very High or High Priority in the 2010 – 2014 Coordinated Plan?

: Very High

- Develop or expand transit and non-agency client transportation services in areas with little or no other transportation options based on identified gaps in transportation services included in Chapters 6 and 7; or
- Develop or expand transportation solutions in areas with sufficient densities to support shared ride or coordinated services based on identified gaps in transportation services included in Chapters 6 and 7.

: High

- Develop a centralized ride scheduling, dispatching, a mobility center
- Improve transportation services to the rural areas
- Increase coordination efforts by combining resources such as vehicles, riders, funds for rides, vehicle maintenance, drivers, driver training, insurance coverage, general ride subsidies, dispatching equipment, software, and gas cards for volunteers
- Increase work-based weekday and weekend service based on identified gaps in service included in Chapters 6 and 7
- Increase work-based weeknight service based on identified gaps in service included in Chapters 6 and 7
- Provide travel training to encourage more individuals to ride regular transit
- Develop or enhance volunteer driver programs
- Upgrade bus stops to include weather protection

SCORING CRITERIA: The information and scoring criteria below will be used to score and rate project applications for JARC funding.

A. Goals and Objectives (15 points)

- Will the project serve the appropriate population? Does the proposal provide pertinent demographic data and/or maps? **(5 points)**
- Will the proposed program increase or enhance the availability of transportation for low-income individuals for job related trips? **(5 points)**
- To what extent is the proposed project consistent with the goals and objectives of the JARC program? **(5 points)**

B. Operational/Implementation Plan (15 points)

- How thorough is the implementation plan? Does the proposal include project tasks, timelines, benchmarks, key milestones, key personnel, deliverables, and routes and schedules as applicable? Does the implementation plan and timeline seem feasible? **(5 points)**
- Does the applicant demonstrate the technical ability to manage the project? Has the applicant effectively implemented projects using federal or state funds in the recent past; has the applicant managed similar projects; has the applicant had sufficient experience in providing services for the targeted clientele? Does the agency have adequate staff to resources to handle the project? If applicable, are drivers properly trained? If applicable, does the agency display the ability to maintain vehicles? **(5 points)**
- Does this project relate to other services or facilities provided by the agency or firm? Does the operational plan correspond with the project goals/objectives? **(5 points)**

C. Program Effectiveness and Performance Indicators (20 points)

- Does the project make use of JARC funds in an efficient and cost-effective manner? **(5 points)**
- Does the proposal describe efforts to ensure the project's cost-effectiveness (and other measurable units of service)? Will the project experience increasing efficiencies over time? If applying for a capital project, does the applicant demonstrate that the purchase is the most cost-effective product for the service being provided? **(5 points)**
- Does the proposal provide measurable performance indicators to measure and evaluate the effectiveness of the proposed project in meeting the identified goals? For capital-related projects, does the applicant establish milestones and methods for reporting the status of project delivery? **(5 points)**
- Does the applicant describe methodologies and procedures for ongoing monitoring and evaluation of the project or service, and steps to be taken if original goals are not achieved? **(5 points)**

D. Coordination and Program Outreach (15 points)

- Does the proposal describe how key stakeholders will remain involved and informed throughout the process? Did the applicant attach ~~three~~one or more letters from other agencies describing how they will be coordinating with the applicant in the provision of transportation services of support from stakeholders to the grant application? (The CTSA and public transit operators proposing a fixed-route project are exempted from submitting letters.) **(5 points)**
- How ~~thorough~~comprehensive are the applicant's proposed strategies for marketing the project and promoting public awareness? **(5 points)**
- To what extent does the project demonstrate coordination among various entities? **(5 point maximum – 1 point per type of coordination)**
 - : Shared use of vehicles
 - : Dispatching or scheduling
 - : Maintenance
 - : Back up transportation
 - : Staff training programs
 - : Joint procurement of services and supplies
 - : Active participation in local social service transportation planning process
 - : Coordination of client trips with other transportation agencies

E. Project Budget (15 points)

- Was a clearly defined budget submitted for the proposed project? **(5 points)**
- Does the project appear to be feasible as described? **(5 points)**
- Is the source of local share stable? **(5 points)**

F. Sustainability (10 points)

- Does the applicant demonstrate a long-term commitment to the project to continue the effort beyond the availability of the requested grant resources? Is this applicant financially capable of sustaining operations after the initial grant funding is expended? **(5 points)**
- Does the applicant provide sufficient justification as to why New Freedom funding is needed for this project? **(5 points)**

G. Innovation (10 points)

- Is the proposed project an innovative solution to addressing the need, and could the innovations be applied to other services in the region? **(5 points)**
- Are there elements of the project that are environmental sustainable (including the use of alternative fuels and clean air vehicles)? **(5 points)**

H. Past Performance (-10% to +2 % adjustment to total point score)

If the applicant has held a JARC, New Freedom, or Senior Mini-Grant award 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 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.

The following four indicators will be used to determine the past performance adjustment. The data used for the first two indicators will be compared to the original proposals submitted, while the last two will be based on ongoing project evaluations and onsite assessment visits. Each category will receive a score ranging from -2.5% to +.5%. For those applicants with more than one existing grant, an average of the performance criteria scores will be used.

1. Cost per unit of service delivered (A unit can be one-way passenger trips, web hits, or referrals, etc)

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- 25 – 30% or more over proposed cost per unit (-2.0%)
- 30% or more over proposed cost per unit (-2.5%)

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 % or more under proposed number of units of service (-.5%)
- 15 – 20% or more under proposed number of units of service (-1.0%)
- 20 – 25% or more under proposed number of units of service (-1.5%)
- 25 – 30% or more under proposed number of units of service (-2.0%)
- 30% or more under proposed number of units of service (-2.5%)

3. Project Management – How well did the grantee manage their project? (-2.5% to +.5 %)

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

- Budget management
- Administration costs
- Coordination
- Service area adherence
- Project schedule
- Invoice and report quality and consistency

4. Service Quality – Did the grantee provide a quality service? (-2.5% to +.5 %)

Service Quality will be based on written evaluations prepared by SANDAG during onsite visits to the grantee including, but not limited to, the following:

- Customer Satisfaction
- Safety
- Training
- Outreach
- Quality Control Measures