



## ***Transportation Committee Agenda***

**Friday, June 6, 2025  
1 p.m.**

Welcome to SANDAG. The Transportation Committee meeting scheduled for Friday, June 6, 2025, will be held in person in the SANDAG Board Room. While Transportation Committee members will attend in person, members of the public will have the option of participating either in person or virtually.

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**Public Comments:** Members of the public may speak to the Transportation Committee on any item at the time the Transportation Committee is considering the item. Public speakers are generally limited to three minutes or less per person.

Persons who wish to address the members on an item to be considered at this meeting, or on non-agendized issues, may email comments to the Clerk at [clerkoftheboard@sandag.org](mailto:clerkoftheboard@sandag.org) (please reference Transportation Committee meeting in your subject line and identify the item number(s) to which your comments pertain). Comments received by 4 p.m. the business day before the meeting will be provided to members prior to the meeting. All comments received prior to the close of the meeting will be made part of the meeting record.

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**Mission Statement:** *We are the regional agency that connects people, places, and innovative ideas by implementing solutions with our unique and diverse communities.*

**Our Commitment to Equity:** *We hold ourselves accountable to the communities we serve. We acknowledge we have much to learn and much to change; and we firmly uphold equity and inclusion for every person in the San Diego region. This includes historically underserved, systemically marginalized groups impacted by actions and inactions at all levels of our government and society.*

*We have an obligation to eliminate disparities and ensure that safe, healthy, accessible, and inclusive opportunities are available to everyone. The SANDAG equity action plan will inform how we plan, prioritize, fund, and build projects and programs; frame how we work with our communities; define how we recruit and develop our employees; guide our efforts to conduct unbiased research and interpret data; and set expectations for companies and stakeholders that work with us.*

*We are committed to creating a San Diego region where every person who visits, works, and lives can thrive.*



# Transportation Committee

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## MEMBERSHIP

The Transportation Committee advises the SANDAG Board of Directors on major policy-level matters related to transportation. The Transportation Committee assists in the preparation of the Regional Transportation Plan and other regional transportation planning and programming efforts. It provides oversight for the major highway, transit, regional arterial, and regional bikeway projects funded under the Regional Transportation Improvement Program, including the *TransNet* Program of Projects. Areas of interest include project schedules, costs, and scope. Members are eligible recipients of salary, per diem, and/or reimbursement of expenses from their associated governmental entity. Mayor John Duncan and Councilmember Jewel Edson are non-salaried members of the FACT Board of Directors. Members should notify the Clerk of the Board if any information is incomplete or incorrect.

The Transportation Committee generally meets at 9 a.m., on the first and third Friday of the month, and 1 p.m. on the first Friday of every-other month.

Staff contact: Brian Lane, (619) 699-7331, [brian.lane@sandag.org](mailto:brian.lane@sandag.org)

### MEMBERS

**Jennifer Mendoza**

Mayor Pro Tem, City of Lemon Grove  
(Representing East County)

**David Zito, Chair**

Councilmember, City of Solana Beach  
(Representing North County Coastal)

**Sean Elo-Rivera, Vice-Chair**

Councilmember, City of San Diego

**John Duncan**

Mayor, City of Coronado  
(Representing South County)

**Monica Montgomery Steppe**

Supervisor, County of San Diego

**Dane White**

Mayor, City of Escondido  
(Representing North County Inland)

**Patricia Dillard**

Metropolitan Transit System

**Priya Bhat-Patel**

North County Transit District

**Esther Sanchez**

San Diego County Regional Airport Authority

**Michael Zucchet**

Commissioner, Port of San Diego

### ALTERNATES

**Ronn Hall**

Councilmember, City of Santee  
(Representing East County)

**Joy Lyndes**

Deputy Mayor, City of Encinitas  
(Representing North County Coastal)

**Marni von Wilpert**

Councilmember, City of San Diego

**Cesar Fernandez**

Councilmember, City of Chula Vista  
(Representing South County)

**Joel Anderson**

Supervisor, County of San Diego

**Mike Sannella**

Deputy Mayor, City of San Marcos  
(Representing North County Inland)

**Cesar Fernandez**

Metropolitan Transit System

**Jewel Edson/Eric Joyce**

North County Transit District

**Rafael Perez**

San Diego County Regional Airport Authority

**Job Nelson**

Port of San Diego

## **ADVISORY MEMBERS**

### **Ann Fox**

Caltrans District 11

### **Erica Pinto (Jamul)**

Southern California Tribal  
Chairmen's Association

### **Jim Custeau**

Association of Planning Groups

### **Melina Pereira**

Caltrans District 11

### **Eric LaChappa (La Posta)**

Southern California Tribal  
Chairmen's Association

### **Paul Dombkowski**

Association of Planning Groups



# Transportation Committee

Friday, June 6, 2025

## Comments and Communications

### 1. Non-Agenda Public Comments/Member Comments

Members of the public shall have the opportunity to address the Transportation Committee on any issue within the jurisdiction of Transportation Committee that is not on this agenda. Public speakers are limited to three minutes or less per person. Public comments under this agenda item will be limited to five public speakers. If the number of public comments under this agenda item exceeds five, additional public comments will be taken at the end of the agenda. Transportation Committee members and SANDAG staff also may present brief updates and announcements under this agenda item.

## Consent

### +2. Approval of Meeting Minutes

Approve

*Francesca Webb, SANDAG*

The Transportation Committee is asked to approve the minutes from its May 16, 2025, meeting.

[Meeting Minutes.pdf](#)

### +3. Federal Transit Administration Section 5311 Program of Projects

Recommend

*Richard Radcliffe, SANDAG*

The Transportation Committee is asked to recommend that the Board of Directors approve the Federal Fiscal Year 2025 apportionments of Federal Transit Administration Section 5311 Non-Urbanized Area Formula Program funds for the San Diego region.

[FTA Section 5311 Program of Projects.pdf](#)

## Reports

### +4. Flexible Fleets Grant Program Final Call for Projects

Recommend

*Jenny Russo, Emily Doss, SANDAG*

The Transportation Committee is asked to recommend that the Board of Directors approve the eligibility and evaluation criteria for the Flexible Fleets Grant Program Call for Projects.

[Flexible Fleets Grant Program Final Call for Projects.pdf](#)

[Att. 1 - Draft Final Flexible Fleets Grant Program Call for Projects.pdf](#)

[Att. 2 - Draft Final Flexible Fleets Grant Program Performance Metrics.pdf](#)

[Att. 3 - Draft Final FFGP Scoring Rubric - New Projects.pdf](#)

[Att. 4 - Draft Final FFGP Scoring Rubric - Existing Projects.pdf](#)

[Att. 5 - Summary of FFGP Feedback and Revisions.pdf](#)

[Att. 6 - Scoring Rubric Metrics for Other Existing Flexible Fleets Modes.pdf Presentation.pdf](#)

### +5. Specialized Transportation Grant Program Cycle 13 Call for Projects Funding Recommendations

Recommend

*Jenny Russo, Aly Vazquez, SANDAG*

The Transportation Committee is asked to recommend that the Board of Directors approve the funding recommendations for the Specialized Transportation Grant Program Cycle 13 Call for Projects as detailed in the report.

[STGP Cycle 13 Call for Projects Funding Recommendations.pdf](#)

[Att. 1 - Discussion Memo.pdf](#)

[Att. 2 - Section 5310 Funding Recommendations.pdf](#)

[Att. 3 - SMG Funding Recommendations.pdf](#)

[Att. 4 - STGP Monitoring Checklist Template.pdf](#)

[Presentation.pdf](#)

**+6. San Diego Regional Vehicle Miles Traveled Mitigation Program**

Discussion

*Jacob Armstrong, Mark Slovick, County of San Diego; Stephen Cook, Intersecting Metrics; Kirsten Uchitel, SANDAG*

SANDAG and County of San Diego staff will provide an update on the status of the Regional Vehicle Miles Traveled Mitigation program.

[San Diego Regional Vehicle Miles Traveled Mitigation Program.pdf](#)

[Att. 1 - Regional VMT Mitigation Program Technical Advisory Committee members.pdf](#)

[Att. 2 - San Diego Regional VMT Mitigation Program - Preferred Option Section Memo.pdf](#)  
[Presentation.pdf](#)

### **Adjournment**

**7. Adjournment**

The next Transportation Committee meeting is scheduled for Friday, June 20, 2025, at 9 a.m.

+ next to an agenda item indicates an attachment

June 6, 2025

## **May 16, 2025, Meeting Minutes**

### **[View Meeting Video](#)**

Vice Chair Sean Elo-Rivera (City of San Diego) called the Transportation Committee meeting to order at 9:05 a.m.

Chair David Zito (North County Coastal) participated in the meeting remotely, and confirmed it was for “just cause” under AB 2449.

#### **1. Public Comments/Communications/Member Comments**

Public Comments: Purita Javier, Cesar Javier, Kaley Levitt, Deb Martin, The Original Dra, Blair Beekman.

Chief Executive Officer Mario Orso provided an update on agency activities.

Member Comments: None.

#### **Consent**

#### **2. Approval of Meeting Minutes**

The Transportation Committee was asked to approve the minutes from its April 18, 2025, meeting.

Action: Upon a motion by Supervisor Joel Anderson (County of San Diego), and a second by Mayor Dane White (North County Inland), the Transportation Committee voted to approve the meeting minutes.

The motion passed.

Yes: Chair David Zito (North County Coastal), Vice Chair Elo-Rivera, Rafael Perez (San Diego County Regional Airport Authority), Supervisor Anderson, Mayor Pro Tem Jennifer Mendoza (East County), Vice Mayor Patricia Dillard (Metropolitan Transit System), Mayor White, Councilmember Jewel Edson (North County Transit District), and Councilmember Cesar Fernandez (South County).

No: None.

Abstain: None.

Absent: Port of San Diego.

#### **Reports**

#### **3. Transportation Development Act: FY 2025 Productivity Improvement Program and FY 2026 Allocations**

Senior Regional Planner Brian Lane presented the item.

Public Comments: Cesar Javier, The Original Dra, Blair Beekman, Marco Espinosa.

Action: Upon a motion by Councilmember Edson and a second by Mayor Pro Tem Mendoza, the Transportation Committee voted to approve the eligibility of the Metropolitan Transit System and North County Transit District to receive their FY 2026 Transportation Development Act allocations of funds.

The motion passed.

Yes: Chair Zito, Vice Chair Elo-Rivera, Rafael Perez, Supervisor Anderson, Mayor Pro Tem Mendoza,

Vice Mayor Dillard, Mayor White, Councilmember Edson, and Councilmember Fernandez.

No: None.

Abstain: None.

Absent: Port of San Diego.

#### **4. SANDAG Grant Programs: Quarterly Status Update and the Smart Growth Incentive Program Amendment Requests**

Senior Grants Program Analyst Goldy Herbon presented the item.

Public Comments: Cesar Javier, The Original Dra, Blair Beekman.

Action: Upon a motion by Mayor Pro Tem Mendoza and a second by Councilmember Fernandez, the Transportation Committee voted to approve a three-month retroactive time extension for the City of Lemon Grove and a six-month time extension for the County of San Diego for their Smart Growth Incentive Program projects.

The motion passed.

Yes: Chair Zito, Vice Chair Elo-Rivera, Rafael Perez, Supervisor Anderson, Mayor Pro Tem Mendoza, Vice Mayor Dillard, Mayor White, Councilmember Edson, and Councilmember Fernandez.

No: None.

Abstain: None.

Absent: Port of San Diego.

#### **5. Specialized Transportation Grant Program Cycle 13 Call for Projects Funding Recommendations**

This item was postponed and will be presented at a future meeting.

#### **6. Adjournment**

The next Transportation Committee meeting is scheduled for Friday, June 6, 2025, at 1 p.m.

Vice Chair Elo-Rivera adjourned the meeting at 10:19 a.m.

## Confirmed Attendance at SANDAG Transportation Meeting

Jurisdiction	Name	Member/ Alternate	Attend
San Diego County Regional Airport Authority	Mayor Esther Sanchez	Member	No
	Rafael Perez	Alternate	Yes
City of San Diego	Councilmember Sean Elo-Rivera, Vice Chair	Member	Yes
	Councilmember Marni von Wilpert	Alternate	No
County of San Diego	Supervisor Monica Montgomery Steppe	Member	No
	Supervisor Joel Anderson	Alternate	Yes
	Vacant	Alternate	
East County	Mayor Pro Tem Jennifer Mendoza	Member	Yes
	Councilmember Ronn Hall	Alternate	No
Metropolitan Transit System	Councilmember Patricia Dillard	Member	Yes
	Councilmember Cesar Fernandez	Alternate	Yes
North County Coastal	Councilmember David Zito, Chair	Member	Yes (Virtual)
	Deputy Mayor Joy Lyndes	Alternate	Yes
North County Inland	Mayor Dane White	Member	Yes
	Councilmember Mike Sannella	Alternate	No
North County Transit District	Mayor Pro Tem Priya Bhat-Patel	Member	No
	Deputy Mayor Jewel Edson	Alternate	Yes
	Deputy Mayor Eric Joyce	Alternate	No
Port of San Diego	Commissioner Michael Zucchet	Member	No
	Job Nelson	Alternate	No
South County	Mayor John Duncan	Member	No
	Councilmember Cesar Fernandez	Alternate	Yes
<b>Advisory Members</b>			
Caltrans	Ann Fox	Member	No
	Melina Pereira	Alternate	Yes
	Roy Abboud	Alternate	No
Southern California Tribal Chairmen's Association	Erica Pinto	Member	No
	Eric LaChappa	Alternate	Yes
Association of Planning Groups	Jim Custeau	Member	No
	Paul Dombkowski	Alternate	No

June 6, 2025

## Federal Transit Administration Section 5311 Program of Projects

### Overview

The Federal Transit Administration (FTA) provides funding for capital and operating assistance to agencies providing transportation services in rural areas through the Section 5311 Non-Urbanized Area Formula Program. On May 7, 2025, Caltrans published the estimated apportionments for the Federal Fiscal Year (FFY) 2025 and requested a call for projects. For the San Diego area, this program is divided between the Metropolitan Transit System (MTS) and the North County Transit District (NCTD) by a formula based on the rural population served by each agency.

### Key Considerations

FTA Section 5311 funds are initially apportioned to the state. The state, in turn, reapportions the funds to the regions based solely on the regional rural population as a share of the total state rural population. Consistent with an agreement with the transit agencies approved in FY 2007, the SANDAG Board of Directors allocates these federal funds based on service area rural population: 59% to NCTD and 41% to MTS. The applications from the transit agencies as well as the SANDAG-approved Section 5311 Program of Projects are due to the state by June 10, 2025.

Based on Caltrans' estimate, there is \$1,086,195 available for San Diego County for FFY 2025. Of this amount, NCTD would receive \$640,855 (59%), and MTS would receive \$445,340 (41%) in FFY 2025. MTS intends to use these funds for intercity bus operations, and NCTD will use these funds for operating costs associated with rural bus routes.

The projects also must be included in an approved Regional Transportation Improvement Program (RTIP). Projects from both agencies were included in their respective transit capital improvement programs and in Amendment No. 4 to the 2025 RTIP, which was approved by the Board at its April 25, 2025, meeting based on funding estimates. The RTIP will be updated in the formal amendment scheduled to go to the Board for approval in October 2025.

### Next Steps

Upon recommendation by the Transportation Committee, this item will be presented to the Board for approval. MTS and NCTD will then submit their FFY 2025 FTA Section 5311 applications prior to receiving the funds.

***Susan Huntington, Director of Financial Planning, Budget, and Grants***

### Action: **Recommend**

The Transportation Committee is asked to recommend that the Board of Directors approve the Federal Fiscal Year 2025 apportionments of Federal Transit Administration Section 5311 Non-Urbanized Area Formula Program funds for the San Diego region.

### Fiscal Impact:

Caltrans estimates \$1,086,195 of Federal Transit Administration Section 5311 funds are available for the San Diego region.

### Schedule/Scope Impact:

None.

June 6, 2025

## Flexible Fleets Grant Program Final Call for Projects

### Overview

Flexible Fleets comprise various modes of on-demand, shared mobility services typically requested or reserved through a smartphone application or call center. In 2023, the SANDAG Board of Directors approved an amendment to the budget that authorized federal funding to develop and implement a grant program to pilot Flexible Fleets projects in the region.

### Key Considerations

The Flexible Fleets Grant Program (FFGP) is intended to fund projects that expand shared mobility travel choices, enhance transit connections, fill transit gaps, improve air quality, and advance the goals of the Regional Plan. The Program will fund projects that can serve as models for the region and demonstrate the ability to sustain operations following the expiration of the grant.

Based on feedback received from Working Groups and the Transportation Committee in winter 2025, staff revised the Draft Call for Projects to allow existing projects to be eligible for funding. New projects are eligible for up to \$1 million in funding, and existing projects are eligible for up to \$500,000. Applications will be scored using either the New Project or Existing Project evaluation criteria (Attachments 3 and 4). A summary of the feedback received, and the changes made is included in Attachment 5. ff

Eligible applicants include federal, state, and local governmental agencies, tribal governments, transit operators, and military institutions. Eligible costs will include service operations and capital expenses, as outlined in the Call for Projects (Attachment 1). Applicants must provide 11.47% of the total project cost in matching funds, which may include in-kind staff time.

### Next Steps

With the recommendation of the Transportation Committee, staff will bring the final Flexible Fleets Call for Projects to the Board for approval to release in summer 2025. The application period will be open for 90 days. Applications will be reviewed by an external evaluation panel with experience in the deployment and operation of Flexible Fleet services. The funding recommendations are expected to be brought to the Transportation Committee in winter 2026.

**Antoinette Meier, Senior Director of Regional Planning**

**Susan Huntington, Director of Financial Planning, Budgets, and Grants**

Attachments: 1. Draft Final Flexible Fleets Grant Program Call for Projects  
2. Draft Final Flexible Fleets Grant Program Performance Metrics  
3. Draft Final FFGP Scoring Rubric – New Projects  
4. Draft Final FFGP Scoring Rubric – Existing Projects  
5. Summary of FFGP Feedback and Revisions  
6. Scoring Rubric Metrics for Other Existing Flexible Fleets Modes

### Action: **Recommend**

The Transportation Committee is asked to recommend that the Board of Directors approve the eligibility and evaluation criteria for the Flexible Fleets Grant Program Call for Projects.

### Fiscal Impact:

Up to \$4.5 million will be made available through the Call for Projects through Overall Work Project No. 3501000: Flexible Fleets Pilots.

### Schedule/Scope Impact:

Pending Board approval, staff anticipates releasing the Call for Projects in summer 2025.





## Draft Final Flexible Fleets Grant Program

### Call for Projects

### Program Website

[www.sandag.org/flexiblefleets](http://www.sandag.org/flexiblefleets)

### Program Contact

SANDAG Grants Distribution Team

[grantsdistribution@sandag.org](mailto:grantsdistribution@sandag.org)

### Eligible Applicants

- Federal, state, and local governments
- Tribal governments
- Transit districts
- Military institutions

### Eligible Services

- Carshare
- Micromobility
- Microtransit
- Neighborhood Electric Vehicle
- Rideshare (excluding Vanpool)

### Example Projects and Activities

- Service Operations
  - Direct operations of an eligible Flexible Fleets service
  - Contracted Flexible Fleets services
- Capital
  - Vehicle procurement
  - Software/hardware
  - Supportive infrastructure (e.g., charging, docking stations, right-of-way improvements, signage, and wayfinding)

### Program Overview

The San Diego Association of Governments (SANDAG) is soliciting applications for its Flexible Fleets grant program. The Flexible Fleets grant program will plan, deploy, and monitor Flexible Fleet projects aimed at expanding shared mobility travel choices, enhancing transit connections, filling transit gaps, improving air quality, and advancing the goals of the Regional Plan.

**Funding Source:** Federal Highway Administration's Surface Transportation Block Grant (STBG)

**Amount of Funding Available:** \$4,500,000

#### Maximum Award:

- New Projects: \$1,000,000
- Existing Projects: \$500,000

### Matching Funds

Matching Funds are required. Applicants must provide 11.47% of the Total Project Cost in Matching Funds.

### Project Types

- New Service – A service that is not currently operating or has not operated in the past ten years.
- Existing Project – A service that is currently operating or has operated in the past ten years.

### Performance Period

- One to Three Years
- Service operations must begin within one year of the grant agreement Notice to Proceed

### Anticipated Timeline

Activity	Date
Release of the Call for Projects	6/30/2025
Deadline to Protest Call for Projects contents	7/7/2025
Pre-Application Webinar	7/16/2025
Call for Projects Question Deadline (by 5 p.m.)	9/17/2025
Deadline to request application assistance	9/17/2025
Responses to all questions released in BidNet	9/23/2025
<b>Application Deadline (by 5 p.m.)</b>	<b>9/30/2025</b>
<b>Applicant Resolution Deadline</b>	<b>10/31/2025</b>
SANDAG Transportation Committee Meeting (proposed funding recommendations)	1/16/2026
SANDAG Board of Directors Meeting (proposed funding recommendations)	1/23/2026
Grant Agreements Executed/Notices to Proceed Issued	March 2026



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## 1. Glossary of Key Terms

**Americans with Disabilities Act (ADA)** prohibits discrimination against and ensures equal opportunity for persons with disabilities in employment, state and local government services, public accommodations, commercial facilities, and transportation (42 USC 12101 et seq.).

**Applicant** is an organization that is considering or has submitted an application in response to a CFP.

**Application Deadline** is the date and time by which applications must be submitted in BidNet to be considered. Applications submitted after the Application Deadline will not be considered. The Application Deadline is located on the first page of this CFP.

**Average Qualitative Score** is the sum of all evaluator scores for an application divided by the number of evaluators. The score is added to the application's Quantitative scores to produce the Total Application Score.

**California Department of Transportation (Caltrans)** is the state agency responsible for administering the STBG funding.

**Call for Projects (CFP)** is the document that SANDAG releases to solicit applications to receive grant funding. The CFP contains information such as Applicant and project eligibility, the application submittal requirements, and the process SANDAG uses to select applications to receive funding, including the evaluation criteria.

**Carshare** is a mode of Flexible Fleet consisting of a variety of short-term car rental services (less than a day) that are reserved and managed through a smartphone application. Services can incorporate fixed stations with dedicated parking spaces or free-floating pick-up and drop-off options within a designated zone. Carshare services typically offer round-trip (car must be returned to its original space) or one-way trip options (car can be dropped off anywhere within a geofence).

**Code of Federal Regulations (CFR)** is the codification of the general and permanent rules published in the Federal Register by the departments and agencies of the Federal Government. An electronic version is available at <https://www.ecfr.gov/>.

**Demand Responsive Service** is any non-fixed route system of transporting individuals that requires advanced scheduling, including services provided by public entities, private nonprofit organizations, and private providers.

**Direct Cost** is an expense that can be directly assigned to a grant relatively easily and with high accuracy. It typically consists of salaries, consultant or contractor services, and other expenses that would not otherwise exist if the project were not in existence.

**Existing Project** is a Flexible Fleet project or service that is currently operating or has operated in the past ten years. Existing microtransit and NEV service zones are included in the Flexible Fleets Grant Program Mapping Tool, which is provided in the resources section.

**Federal Audit Clearinghouse** is a federal website that SANDAG uses to review an Applicant's federal grant audits to assist with the pre-award risk assessment. The website contains a

searchable database for single audit submissions from 2016 to the current fiscal year. The website is available at <https://www.fac.gov/>.

**Federal Funding Accountability and Transparency Act (FFATA)** requires the federal Office of Management and Budget to maintain a single, searchable website that contains information on all Federal spending awards.

**Federal Highway Administration (FHWA)** is a USDOT division specializing in highway transportation. FHWA has authority over the STBG funding that is being used for this grant program.

**Federal Register** is the official journal of the federal government of the United States that contains government agency rules, proposed rules, and public notices. It is published every weekday except on federal holidays. It is available at <https://www.federalregister.gov/>.

**Federally Negotiated Indirect Cost Rate (FNICR)** is an Indirect Cost Rate applicable to a specified past period that a federal agency has approved for use. All federal agencies and pass-through entities must accept the rate. An agency typically receives a Negotiated Indirect Cost Rate Agreement (NICRA) that includes the FNICR.

**Flexible Fleets** is an initiative that uses on-demand transportation services to move around the region. Riders can use these services to reach their destinations or to connect to high-speed transit. Flexible Fleets consists of a variety of on-demand, shared mobility services that are typically requested or reserved through a smartphone application or call center. The goal of this initiative is to provide affordable transportation choices for all users while helping to reduce air pollution and congestion. Flexible Fleet service modes include Micromobility, Neighborhood Electric Vehicle, Carshare, Rideshare, and Microtransit.

**Flexible Fleets Grant Program** is a new, one-time grant program being offered by SANDAG to fund projects that implement Flexible Fleets.

**Grant Term** is the period of time during which expenses for project-related activities can be incurred to be eligible for reimbursement. It begins on the NTP date and extends through the grant agreement expiration date.

**Grantee** is an organization that has been awarded funding through the Flexible Fleets Grant Program and has entered into a grant agreement with SANDAG.

**Indirect Cost Allocation Plan (ICAP)** is the documentation prepared by an agency to substantiate its request to establish an Indirect Cost Rate.

**Indirect Cost** is an expense incurred for a common or joint purpose benefiting more than one cost objective or project and cannot be readily assigned to a specific grant, contract, or other activity. Indirect costs typically include rent, insurance, copying expenses, fringe benefits, and other costs not directly charged to the grant project that the local jurisdiction's general fund typically supports.

**Indirect Cost Rate** is the ratio (expressed as a percentage) of the Indirect Costs to a Direct Cost base.

**Individuals with Limited English Proficiency (LEP)** are persons for whom English is not their primary language and have a limited ability to read, write, speak, or understand English.



Individuals with LEP include those who report to the U.S. Census that they speak English less than very well, not well, or not at all.

**Low-income Person** refers to an individual whose family income is at or below 200% of the poverty line as defined by the Office of Management and Budget based on the most recent data available from the U.S. Census Bureau for a household of the size being evaluated.

**Low-Income Population** refers to any readily identifiable group of low-income persons who live in geographic proximity, and, if circumstances warrant, geographically dispersed/transient persons (such as migrant workers or Native Americans) who will be similarly affected by a proposed SANDAG-funded program, policy, or activity.

**Match Percentage** is calculated by dividing the total Matching Funds by the sum of the Matching Funds and the grant award.

**Matching Funds** is the funding other than the grant award that goes towards the Total Project Cost. It is often represented as a percentage of the Total Project Cost.

**Micromobility** is a mode of Flexible Fleet consisting of small, low-speed vehicles such as e-scooters, e-bikes, and other electric rideables.

**Microtransit** is a mode of Flexible Fleet consisting of multi-passenger shuttles that can carry up to 15 passengers and provide rides within a defined service area.

**Minimum Total Application Score** is the Total Application Score value that an application must be equal to or greater than to be eligible to receive funding from this CFP.

**Neighborhood Electric Vehicle (NEV)** is a mode of Flexible Fleet consisting of low-speed electric vehicle shuttles that are used for short trips (up to three miles). NEVs typically operate on a fixed route or an on-demand route, where the NEV shuttle can be hailed with a smartphone application.

**New Service** is a Flexible Fleet project or service that is new to the region, is not currently operating, or has not operated in the past ten years.

**Non-Scalable Project** is a project whose scope of work cannot be reduced because doing so (a) is not possible, (b) would create an incomplete project that contributes little to the grant program goals or provides little value to those intended to benefit from the project, or (c) would have scored substantially differently in the competitive process with a reduced scope of work.

**Notice to Proceed (NTP)** is a written notice issued by SANDAG that allows the Grantee to begin working on the project and marks the beginning of the Grant Term.

**Office of Foreign Assets Control Sanctions List Search** is a federal website that SANDAG uses to determine whether an Applicant is eligible to receive federal funding. The website contains a searchable database of all individuals and organizations that are subject to trade sanctions by the federal government. The website is available at <https://sanctionssearch.ofac.treas.gov>.

**Performance Measure** is the numeric value assigned to the Performance Metric to show the quantity or extent of the item being observed by the metric. For example, the number of participants that attend an outreach meeting for a project is the Performance Measure that

could be used to demonstrate the Performance Metric on increased stakeholder engagement.

**Performance Metric** is the specific, quantifiable unit of measurement that will be used to determine a project's success in meeting the Flexible Fleets Grant Program's goals and objectives. For example, a Performance Metric could be the number of Flexible Fleet trips completed over a specific period of time.

**Project Milestone and Completion Deadlines** are outlined in SANDAG Board Policy No. 035 and require Grantees to complete and implement projects quickly so the public can benefit from project deliverables as soon as possible. Failure to meet the deadlines following SANDAG's issuance of the NTP on the project may result in the revocation of all grant funds not already expended.

**Qualitative Criteria** are subjective criteria in which discretion is needed to provide a score. Often, Qualitative Criteria evaluate how well an Applicant responded to an application question or how well the proposed project will achieve a stated goal. These criteria are subjective in nature, and scores are determined at the evaluator's discretion.

**Quantitative Criteria** are objective criteria for which a formula or conditional statement is used to provide a score. Often, Quantitative Criteria seek to evaluate a project-related data point or metric against a range or scale and assign a point value based on where the data point or metric falls within the range or scale. Other Quantitative Criteria assign a point value based on responses to a conditional statement, such as a yes/no question or the presence or absence of a condition.

**Regional Plan** refers to the SANDAG Regional Transportation Plan, a federal- and state-mandated planning document prepared by SANDAG that describes existing and projected transportation needs, conditions, and financing affecting all modes of transportation over a planning period of at least 20 years. The most recently adopted version, the 2021 Regional Plan, was approved in December 2021. More information on the Regional Plan is available here: <https://www.sandag.org/regional-plan>.

**Ridehailing** is an on-demand service that links passengers with available drivers, such as Uber, Lyft, and taxis.

**Rideshare** is a mode of Flexible Fleet consisting of carpool and pooled Ridehailing services such as uberPOOL and Lyft Shared.

**Scalable Project** is a project whose scope of work can be reduced while furthering the grant program goals and providing significant value to the public intended to benefit from the project. SANDAG staff will consider how the project would have scored in the competitive process if the scope of work were reduced. If the project had scored substantially the same with the scaled-down scope of work and the scaled-down project would further the grant program goals and provide significant value to the public, then the project may be scaled.

**Subapplicant** is an entity that would serve as a third-party contractor or consultant under an Applicant if the Applicant's proposed project is awarded funding.

**Surface Transportation Block Grant Program (STBG)** funds are federal gas tax dollars distributed by Caltrans to areas within the state for roads, transit, non-motorized, and other transportation needs. The program was formerly known as the Regional Surface

Transportation Program (RSTP). STBG funds are being used to fund the Flexible Fleets Grant Program.

**System for Award Management** is a federal website that SANDAG uses to determine whether an Applicant is eligible to receive federal funding. The website contains a searchable database of all individuals and organizations that are debarred, suspended, or otherwise excluded from receiving government contracts or funding. The database also contains information regarding SANDAG subawards pursuant to FFATA. The website is available at [www.sam.gov](http://www.sam.gov).

**Total Application Score** is the sum of an application's Average Qualitative Score and the application's Quantitative scores. The score determines the order in which projects are recommended to receive funding through this CFP.

**Total Project Cost** is calculated as the sum of the grant award and the Matching Funds.

**Transportation Committee (TC)** is one of six policy advisory committees at SANDAG that advise the Board of Directors on policy-level matters related to transportation, including the Regional Plan. The TC reviews and provides recommendations to the Board on the eligibility and evaluation criteria of the CFP and reviews and provides recommendations to the Board on the Flexible Fleets Grant Program funding recommendations. The TC also receives quarterly reports on the status of each awarded grant and has the authority to grant time extensions for individual projects. More details on TC are available [here](#).

**Unique Entity Identifier (UEI)** is a number assigned to an agency or organization when it registers in the System for Award Management. SANDAG requests the UEI of each Applicant to review federal records and ensure the Applicant is not debarred, suspended, or subject to trade sanctions. SANDAG also uses the UEI number to review federal records regarding an Applicant when completing the pre-award risk assessment. More information on UEIs is available [here](#).

**United States Code (USC)** is the official codification of the general and permanent federal statutes of the United States. It contains 53 titles, which are organized into numbered sections. The USC does not include regulations issued by executive branch agencies, decisions of the Federal courts, treaties, or laws enacted by State or local governments. Regulations issued by executive branch agencies are available in the CFR. Proposed and recently adopted regulations may be found in the Federal Register.

**United States Department of Transportation (USDOT)** is one of the executive departments of the federal government, whose mission is to deliver the world's leading transportation system through the safe, efficient, sustainable, and accessible movement of people and goods. The USDOT has 11 operating administrations, including the FHWA, Federal Transit Administration, Federal Railroad Administration, and National Highway Traffic Safety Administration, among others.

## 2. List of Resources

Below is a list of resources referenced in this CFP and a description of how to use these resources.

Resource/Links	What to do?
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<a href="#">BidNet</a>	Access the CFP materials, submit and receive responses to questions, receive any updates to the CFP, and submit a completed application for consideration.
<a href="#">Draft Proposed 2025 Regional Plan Transportation Network: San Diego Region</a>	Reference the Microtransit and NEV Service Zones in this document to inform project planning.
<a href="#">Federal Audit Clearinghouse</a>	Review the Applicant's prior single audit submissions to the federal government to determine potential pre-award risk assessment topics that SANDAG may identify.
<a href="#">Flexible Fleets Implementation Strategic Plan</a>	Review the document that provides a roadmap for planning and implementing Flexible Fleet programs in communities across the region. The Plan includes a description of Flexible Fleets services, a review of case studies, a summary of outreach to SANDAG's various Community-Based Organizations (CBOs), a "regional scan" of the County that identifies the suitability for Flexible Fleets services in various opportunity areas, and the Implementation Strategic Plan that identifies a path forward for deploying Flexible Fleets projects in the opportunity areas with the highest suitability.
Flexible Fleets Performance Metrics	Review the Performance Metrics that will be used to measure a project's success in meeting the Flexible Fleets goals. This resource is available in BidNet with the CFP materials.
<a href="#">Flexible Fleets Grant Program Mapping Tool</a>	Utilize the map to determine project eligibility and how points will be determined for several evaluation criteria. The map will also be used to submit information in the application. The map contains layers for the following: <ul style="list-style-type: none"> <li>• Transit Stops and a half-mile buffer area</li> <li>• Military facilities</li> <li>• Tribal lands</li> <li>• Jurisdiction boundaries</li> <li>• Existing Microtransit and NEV service zones (excluding Micromobility, Rideshare, and Careshare)</li> </ul>
<a href="#">Flexible Fleets Webpage</a>	Learn about Flexible Fleets, SANDAG's on-call contracts for service providers, and other Flexible Fleet services in operation in Pacific Beach and Oceanside.
<a href="#">LEP Website</a>	Review information, tools, and technical assistance provided by the US Department of Justice for compliance with federal LEP requirements.
<a href="#">SANDAG Board Policy No. 035</a>	Review the Board Policy that governs SANDAG's Competitive Grant Programs and provides the milestone and completion deadlines for each project type.
SANDAG Grant Programs ADA and Title VI Guide	Review the Guide that includes templates, tools, and instructions to assist Grantees in meeting their ADA and Title VI requirements.

SANDAG Grant Programs ADA and Title VI Guide Templates	Use these templates to develop the Grantee's Title VI program. This resource is available in BidNet with the CFP materials.
<a href="#">SANDAG Grant Programs Webpage</a>	Explore SANDAG's grant programs, review grant project progress reports, and access documents applicable across all grant programs, such as the Grant Program Protest Procedures and BidNet registration and navigation information.
<a href="#">SANDAG Language Assistance Plan</a>	Review the document that outlines the measures that SANDAG will take to assist LEP persons. It also identifies how SANDAG trains employees and provides notice to people with LEP, and details how the plan will be monitored.
<a href="#">System for Award Management</a>	Review the Applicant and all Subapplicant profiles in this federal website to determine whether the Applicant or any Subapplicant is debarred, suspended, or otherwise excluded from receiving government contracts or funding. The website also contains the Applicant's UEI number and additional information that SANDAG will review in the pre-award risk assessment.

### 3. Background

#### 3.1. About SANDAG

The San Diego Association of Governments (SANDAG) is the San Diego region's primary public planning, transportation, and research agency, comprising the 18 cities and the County of San Diego. SANDAG serves as the public forum for regional policy decisions about growth, transportation, environmental management, housing, open space, energy, public safety, and binational collaboration.

SANDAG's vision is to pursue a brighter future for everyone living, working, or recreating in the San Diego region. To this end, SANDAG plans and implements projects that seek to use land more wisely, build a more efficient and accessible transportation system, protect the environment, improve public health, promote a strong regional economy, better manage our access to energy, incorporate accessibility into the planning process, address pressing needs on tribal lands, and support a vibrant international border.

SANDAG receives local, state, and federal funds to implement regional policies, programs, and projects that advance its vision. SANDAG passes through a portion of its funding through several [competitive grant programs](#). These grant programs provide local, state, and federal funding to local jurisdictions, nonprofits, and other partners to accomplish regional goals at the local level. Grants awarded range from infrastructure projects, habitat management and monitoring efforts, and specialized transportation services for senior and disabled populations. While each grant program maintains a particular focus, all work together to enhance our region's quality of life.

## 3.2. Flexible Fleets Grant Program

### 3.2.1. Overview

Flexible Fleets, one of the key strategies in the Regional Plan, has emerged as a promising sustainable travel option. In efforts to implement the Regional Plan, SANDAG developed a Flexible Fleets Implementation Strategic Plan that identifies priority Flexible Fleet service areas and provides a detailed roadmap for deploying services in a way that helps make the region more accessible.

In 2024, the SANDAG Board of Directors approved an amendment to the Fiscal Year 2024 budget that authorized 5 million dollars in federal STBG funding to implement a Flexible Fleets Grant Program. This one-time funding is offered to help implement Flexible Fleet strategies across the region.

### 3.2.2. Goal(s) and Objectives

The Flexible Fleets Grant Program aims to plan, deploy, and monitor Flexible Fleet projects to expand shared mobility travel choices, enhance transit connections, fill transit gaps, and advance the goals of the Regional Plan. The Flexible Fleets Grant Program seeks to fund projects that can serve as models around the region and continue to be funded following the expiration of the grant. Projects funded by this program must support the objectives outlined below, which are derived from the STBG funding requirements (Section 7) and the [Flexible Fleets Implementation Strategy](#):

- Serve as model examples for Flexible Fleets in a variety of locations throughout the region
- Provide more mobility options and greater accessibility.
- Demonstrate financial sustainability through other funding sources besides the Flexible Fleets Grant Program for a period of at least one year after the grant expires.

## 4. Eligibility

### 4.1. Eligible Applicants, Subapplicants, Consultants, and Contractors

#### 4.1.1. Eligible Applicants

- Federal, state, and local government agencies
- Tribal governments
- Transit districts
- Military institutions

To be eligible to receive grant funding through this CFP, Applicants must not be debarred, suspended, or subject to trade restrictions with the United States government. SANDAG will verify through the System for Award Management and the Office of Foreign Assets Control Sanctions List Search that each Applicant is an eligible recipient.

#### 4.1.2. Competitive Procurement Requirements for Subapplicants, Consultants, and Contractors

Any third-party contract for a non-public agency Subapplicant, consultant, or contractor for which an Applicant intends to seek reimbursement must be awarded competitively. Applicants are advised not to name any non-public agency Subapplicant, consultant, or contractor in the application unless the third-party contractor has been selected in compliance with competitive procurement requirements. SANDAG does not accept requests for sole source contracts based on a third-party contractor's role in preparing an application or an existing relationship that an applicant may have established without complying with competitive procurement requirements. See the grant agreement for additional details regarding third-party contracting requirements.

#### 4.1.3. Single Audit Requirement

An Applicant that expends more than 1 million dollars in federal awards in a given fiscal year is required to have a single audit performed for that fiscal year in accordance with 2 CFR 200 unless the Applicant elects to have a program-specific audit. Applicants who meet this threshold must provide their most recent single audit to SANDAG with their application.

### 4.2. Eligible Projects

#### 4.2.1. Eligible Modes and Services

Applicants may request funding for any of the following Flexible Fleets services. All services must be provided within San Diego County.

- Carshare
- Micromobility
- Microtransit
- Neighborhood Electric Vehicle
- Rideshare
  - Please note that vanpool services are not eligible under this program. SANDAG has a robust vanpool program that offers subsidies to eligible participants. More information is available at: <https://www.sandag.org/projects-and-programs/regional-initiatives/sustainable-transportation-services/vanpool>.

Applicants can request funding for New Services or Existing Services.

#### 4.2.2. Eligible Project Types

Eligible project categories are listed below. Applicants are encouraged to contact SANDAG by the CFP Question Deadline if they have questions about a proposed project's eligibility under this program.

- Service Operations
  - Direct operations of an eligible Flexible Fleets service
  - Contracted Flexible Fleets services
- Capital
  - Vehicle purchase



- Software/hardware purchase
- Supportive infrastructure (e.g., charging, docking stations, right-of-way improvements, signage, and wayfinding)

All projects must have pre-launch and continuous community surveying and engagement. Applicants will outline their engagement strategy within the application narrative.

If an Applicant charges a fare for their service, trips connecting to and from transit stops and stations should remain free for the duration of the SANDAG-funded program.

## 4.3. Other Project Eligibility Requirements

### 4.3.1. Safety Requirements

All drivers must clear a criminal history check and driver records check before transporting members of the public. This includes staff drivers, contracted drivers, and volunteer drivers. Drivers must possess a valid driver's license appropriate for the vehicle driven. Drivers shall also be physically capable of safely driving the service vehicles. Vehicles funded through the Flexible Fleets Grant Program or that provide a Flexible Fleets Grant Program-funded service must be deemed safe by the Applicant before being operated.

### 4.3.2. Notice of Prevailing Wage

California law requires that public works projects pay prevailing wages for workers. As applicable, Grantees must comply with the provisions of California Labor Code Sections 1775 et seq, which includes the payment of prevailing wages to all workers performing prevailing wage work. Additional details can be found in the grant agreement. Capital projects that include the installation of shelters, signage, or other items may be subject to prevailing wage requirements.

### 4.3.3. Insurance Requirements

Non-public agency Applicants will be required to provide proof of insurance. The required insurance certificates and endorsements must comply with all requirements included in the grant agreement. SANDAG will not execute the grant agreement until the Grantee complies with the insurance requirements.

## 5. Funding

### 5.1. Available Funding

\$4.5 million is available through this CFP.

SANDAG reserves the right to partially fund projects and to fund less than the amount available in a given grant cycle. See the section entitled "Partial Awards".

### 5.2. Minimum and Maximum Grant Awards

The minimum and maximum grant awards are as follows:

- Maximum Award for New Projects: \$1,000,000
- Maximum Award for Existing Projects: \$500,000

### 5.3. Match Requirement

Matching Funds are required for all Applicants. Applicants must provide at least 11.47% of the Total Project Cost in Matching Funds to be eligible. Matching Funds must be expended during the grant term. Examples of possible Matching Funds include, but are not limited to:

- Federal, state, or local funding
- Staff time, including planning and project oversight.
- Private donations
- Revenues from service contracts
- Net income generated from advertising and concessions
- Donations, volunteered services, or other in-kind contributions

Applications that do not have sufficient Matching Funds will not be considered. Applicants must provide adequate documentation of Matching Funds and the match source(s) in the application.

### 5.4. Eligible and Ineligible Expenses

#### 5.4.1. Federal Contract Cost Principles and Procedures

The Grantee and its third-party contractors are responsible for compliance with the federal contract cost principles and procedures outlined in 48 CFR Part 31, which will be utilized to determine the allowability of individual project cost items.

#### 5.4.2. Eligible Expenses

Eligible expenses must be directly related to executing the project scope of work, including Direct and Indirect Costs. SANDAG will only reimburse costs incurred for the project after the NTP has been issued and up to the amount awarded in the grant agreement. In the event of project cost overruns, SANDAG will not pay more than the original amount specified in the grant agreement.

##### 5.4.2.1. Travel Expenses

Transportation and subsistence costs will be reimbursed at the actual costs incurred by the Grantee and its third-party contractors, as supported by receipts, shall not exceed the maximum amounts authorized for state employees, which are available at <https://www.calhr.ca.gov/employees/Pages/travel-reimbursements.aspx>. All costs, including travel, shall be invoiced to SANDAG without markup for profit.

#### 5.4.3. Ineligible Activities and Expenses

Ineligible projects and activities are those that do not align with the program goals and objectives or are listed as unallowable in 48 CFR Part 31.

## 5.5. Indirect Costs

Grant funds may be used toward Indirect Costs if they are related to the project scope of work and the application indicates that reimbursement for indirect costs would be requested. Applicants requesting reimbursement for indirect costs must disclose this in their application.

Applicants must use one of the following options to receive reimbursement for indirect costs:

- If the Applicant has a FNICR recognized by the federal government, that rate must be used, and the approval must be submitted to SANDAG.
- Elect the de minimis rate under 2 CFR 200 if the Applicant has never received a FNICR. The current de minimis rate is 15%. Applicants with an ICAP approved by their elected body (City Council or Board of Supervisors), management, another individual within the agency, or any other non-federally approved agency must choose to elect the de minimis rate when charging indirect costs.

## 6. Other Program Requirements

### 6.1. Federal Provisions

The Flexible Fleets Grant Program is funded with federal STBG monies. The Grantee must abide by the FHWA Provisions included in the grant agreement.

#### 6.1.1. Disadvantaged Business Enterprise

Grantees must agree to take all necessary and reasonable steps outlined in 49 CFR 26 and USDOT regulation "Participation by Disadvantaged Business Enterprise (DBE) in DOT Financial Assistance Programs" to ensure nondiscrimination in the award and administration of third-party contracts. It is SANDAG's policy that DBEs and small businesses have an equal opportunity to participate in the performance of contracts financed in whole or in part with federal funds.

#### 6.1.2. Drug and Alcohol Testing

Grantees must comply with the Federal Motor Carrier Safety Administration (FMCSA) rule for all employees who hold Commercial Driver's Licenses (CDLs) (49 CFR 382). This part applies if the CDL holder operates a "commercial motor vehicle," which means a motor vehicle having a gross combination weight rating or gross vehicle weight rating of 26,001 or more pounds or which is designed to transport 16 or more passengers, including the driver (49 CFR 382.103[a][1], 49 CFR 382.107).

#### 6.1.3. Buy America

Grantees must comply with the Build America, Buy America Act (BABA), which governs steel, iron, manufactured products, and construction materials permanently incorporated into federal aid projects. BABA includes substantive changes to the existing Buy America provisions. Compliance with the new requirements is required unless the Grantee can qualify for a waiver or exemption. Absent a waiver or exemption, the Grantee shall not approve the use of any iron, steel, manufactured products, or construction materials in grant-funded

projects unless such materials have been produced in the United States, including vehicles. Additional details can be found in the grant agreement.

## 6.2. Non-Discrimination

SANDAG includes non-discrimination provisions in its grant agreements with all Grantees. Among other provisions in the SANDAG grant agreement, Grantees must include non-discrimination and compliance provisions in all contracts with third-party entities.

Grantees and all of their third-party contractors are prohibited from unlawfully discriminating, harassing, or allowing harassment against any employee or applicant for employment because of any class protected by applicable state or federal law. Grantees and their third-party contractors must ensure that the evaluation and treatment of their employees and applicants for employment are free from such discrimination and harassment. Grantees and their third-party contractors must comply with the provisions of the California Fair Employment and Housing Act (Government Code Section 12900 et seq.) and any associated regulations (California Code of Regulations, Title 2, Section 1000 et seq.).

Grantees and their third-party contractors must provide written notice of their obligations under these provisions to labor organizations with a collective bargaining or other agreement. Because SANDAG receives federal funds, SANDAG must comply with federal requirements and regulations. Under its agreement with the federal funding agencies, SANDAG passes down applicable requirements to all Grantees and third-party contractors regardless of the grant funding source.

## 6.3. Title VI

All Grantees are required to comply and ensure compliance by all Subapplicants and third-party contractors with Title VI of the Civil Rights Act of 1964, which prohibits discrimination on the basis of race, color, and national origin. Applicants awarded Flexible Fleets Grant Program funds are required to develop a Title VI Program accepted by SANDAG and approved by their governing bodies before grant execution. All Grantees must also update their Title VI Program and seek approval from SANDAG and their governing body every three years.

All Grantees must establish and implement procedures to ensure timely resolution of Title VI complaints and sufficiently document steps taken to investigate and address Title VI complaints.

The following components are required to be included in a Grantee's Title VI Program:

- Title VI Notice to the Public - Grantees are required to notify the public of their protection against discrimination under Title VI. The Title VI Notice to the Public must include: (1) a statement that the Grantee operates its programs without regard to race, color, or national origin; (2) a description of the procedures that members of the public should follow to request information on the Grantee's Title VI obligations; and (3) a description of the procedures that members of the public should follow to file a Title VI discrimination complaint against the Grantee.

- Title VI Notice to the Public Availability - Per federal requirements, Grantees must post or make available their Title VI Notice to the Public, at a minimum, in the following areas: the Grantee's website, any public area of the Grantee's office, including the reception desk and meeting rooms, and transit vehicles and/or stations or stops. In its Title VI Program, the Grantee must identify the locations where the agency has posted its Title VI Notice to the Public.
- Complaint Form and Procedures - Grantees are required to have complaint procedures and a form through which the public may file a Title VI discrimination complaint. In its Title VI Programs, the Grantee must identify how its agency makes the complaint form and procedures available to the public, including for non-English or LEP speakers.
- Record and Report Transit-Related Title VI Investigations, Complaints, and Lawsuits - Grantees must include a record of any complaints or lawsuits alleging discrimination on the basis of race, color, and national origin.
- Public Participation Plan - Grantees are required to have a public participation plan that describes their strategies to market their program, encourage public participation, and perform community outreach. Grantee's strategies should be tailored to the unique population that they serve and should include special consideration for low-income, minority, and LEP populations.
- Meaningful Access for LEP Persons - Grantees are required to perform a Four-Factor Analysis to determine the specific language services that are appropriate for their agency to provide and develop a Language Assistance Plan based on the results of this analysis. The Four-Factor Analysis requires Grantees to determine: (1) the number of LEP persons eligible to be served by their program; (2) the frequency with which LEP persons come into contact with their program; (3) the importance of their program to the lives of LEP persons; and (4) the resources available to the Grantees for LEP outreach as well as the cost associated with that outreach. In addition to other resources, the SANDAG Grant Programs ADA and Title VI Guide provides a step-by-step tutorial on how to access and report on census data to assist Grantees in successfully completing Factor 1 of the Four-Factor Analysis. Additionally, if Grantees have multiple grant-funded projects with varying project service areas, Grantees should use an aggregation of these project service areas to complete Factor 1 of the Four-Factor Analysis. The project service area(s) used must be consistent with what the Grantee submitted during the application phase.
- Minority Representation on Planning and Advisory Bodies - Grantees that have transit-related, non-elected governing boards, advisory councils, or committees (the membership of which is selected by the Grantee) are required to provide a table depicting the racial breakdown of the membership of those committees, and a description of efforts made to encourage the participation of people of color on such committees.
- Resolution - Grantees are required to submit a resolution from their governing body that approves their Title VI Program.

## 6.4. Limited English Proficient Populations

Grantees are responsible for ensuring meaningful access to their transportation program by LEP persons pursuant to Title VI. More information is available on the federal LEP website and in the SANDAG Language Assistance Plan.

## 6.5. ADA Compliance

Grantees are required to comply with requirements under the ADA. Grantees must inform SANDAG of any complaints alleging discrimination based on disability by the Grantee or a third-party contractor. SANDAG [Board Policy No. 009](#) outlines procedures for tracking and resolving complaints alleging discrimination. The SANDAG Discrimination Compliance Officer and Grants Division staff are responsible for tracking ADA complaints and working with Grantees to resolve ADA-related complaints promptly.

SANDAG prohibits Grantees from using vehicles that are deemed unsafe to operate. This prohibition extends to accessible equipment such as ramps and lifts, meaning accessible equipment must be operable and safe before a vehicle can transport individuals with disabilities through a grant-funded project.

SANDAG reviews Grantee policies and procedures to verify ADA compliance pertaining to service animals, respirator or portable oxygen supplies, and accessible information. SANDAG may request response time or other data or information on Grantee policies or procedures to confirm that an equivalent level of service is being provided. Further, SANDAG confirms that all Grantees have ADA complaint procedures. SANDAG also confirms that Grantees have a complaint form readily accessible to service beneficiaries so that those beneficiaries can submit a complaint on the grounds of ADA and/or Title VI. During desk reviews and/or site visits, SANDAG verifies that Grantees have maintained a log of ADA or Title VI-related complaints, investigations, and lawsuits.

## 6.6. Equal Employment Opportunity

The Equal Employment Opportunity (EEO) provision requires that SANDAG and all Grantees provide equal employment to all people, regardless of race, color, religion, sex, national origin, disability, or any other class of persons protected by applicable state or federal law. SANDAG requires that its Grantees certify their compliance with the EEO federal requirements of Title VII of the Civil Rights Act of 1964, as amended (42 USC 2000e and 49 USC 5332) and any implementing requirements the federal agencies or SANDAG may issue.

## 6.7. SANDAG Board Policy No. 035

[SANDAG Board Policy No. 035](#), "Competitive Grant Program Procedures," applies to all grant programs administered through SANDAG. Applicants should be aware of the following requirements.

### 6.7.1. Applicant Resolution

Within 30 days following the grant application deadline, Applicants must submit a resolution from their authorized governing body that:

- commits to providing the minimum Matching Funds percentage outlined in the CFP; and
- authorizes the Applicant's staff to accept the grant funding and execute a grant agreement if an award is made by SANDAG.

**If an Applicant fails to provide a resolution that meets the above requirements, that application will be considered nonresponsive and will no longer be considered in the competitive process.**

Applicants are encouraged to use the sample resolution included in this CFP.

If the Applicant wishes to submit its Board Policy No. 035 resolution with its Application by the Application Submission deadline, it may include its resolution in BidNet. If the Applicant does not submit its Board Policy No. 035 resolution by the Application Deadline, the resolution must be emailed to [grantsdistribution@sandag.org](mailto:grantsdistribution@sandag.org) by the date listed in the Timeline.

### 6.7.2. Grant Agreement Execution

After the Board approves the funding recommendations, SANDAG will present a grant agreement to the awarded Applicant. An authorized representative of the awarded Applicant must sign the grant agreement within 45 days from the date SANDAG presents the grant agreement to the awarded Applicant. Failure to meet this requirement may result in revocation of the grant award. Applicants are encouraged to review the sample grant agreement included with this CFP to ensure compliance with this provision.

### 6.7.3. Project Milestone and Completion Deadlines

When signing a grant agreement, Grantees must agree to the project deliverables and schedule in the agreement. In addition, a Grantee's project schedule in its application and grant agreement must adhere to the deadlines listed below. Failure to meet the Project Milestone and Completion Deadlines following SANDAG's issuance of the NTP on the project may result in the revocation of all grant funds not already expended.

- **Operations Projects.**
  - Any operations project requiring a services contract must commence within eighteen months following SANDAG's issuance of the NTP on the project.
  - If no services contract is necessary, the project must commence within one year of SANDAG's issuance of the NTP on the project.
- **Equipment or Vehicle Projects.** If the grant will fund the purchase of equipment or vehicles, any necessary purchase contract for equipment or vehicles must be awarded within six months following SANDAG's issuance of the NTP on the project, and use of the equipment or vehicles for the benefit of the public must commence within three months following acceptance of the equipment or vehicles.

Grantees may request and be granted a twelve-month extension at the SANDAG staff level. This twelve-month period is cumulative over the entire duration of the grant. Grantees must request and receive approval from the appropriate policy advisory committee for time extensions longer than twelve months. In all instances, a Grantee seeking an extension must document previous efforts undertaken to maintain the project schedule, explain the reasons for the delay, explain why the delay is unavoidable, and demonstrate an ability to succeed in the extended timeframe the Grantee proposes.

## 6.8. Performance Measures

SANDAG has identified several Performance Metrics that will be used to measure a project's success in meeting the Flexible Fleets Grant Program goals and objectives. Applicants must review the Flexible Fleets Grant Program Performance Metrics and provide baseline data in their application that will be used to measure their project's success at the end of the grant



agreement. The Flexible Fleets Grant Program Performance Metrics are provided as an attachment to this CFP and are available in BidNet.

All Flexible Fleets Grant Program Grantees are encouraged to meet the Performance Measures, which will be included in the grant agreement. The Grantee must report on its progress toward meeting the Performance Measures in its quarterly progress report.

## 6.9. Project Implementation and Oversight Requirements

### 6.9.1. Project Communication

#### 6.9.1.1. Project Manager Continuity

The Grantee must provide SANDAG with contact information for the project manager and keep this information up to date. SANDAG should be notified promptly in case of a change to the Grantee's project manager.

#### 6.9.1.2. Media and Community Outreach

Grantees must also notify SANDAG of events or promotions related to the grant-funded project, such as groundbreakings, ribbon cuttings, community workshops, media, and community outreach. For these activities, the Grantee must notify SANDAG and provide before and after photos as applicable. SANDAG staff may attend any meetings as appropriate.

Grantees are encouraged to use social media to inform the public of project accomplishments and performance. When using social media to post information on grant-funded projects, Grantees should use the SANDAG grants communications guidelines available by contacting the Flexible Fleets Grant Program Manager.

#### 6.9.1.3. Outreach Materials

Outreach materials include, but are not limited to, fliers, posters, web updates, and newsletters that are used to inform the public of the grant-funded project. Outreach materials geared toward the target population that communicate vital information such as eligibility requirements, project enrollment information, or ways to provide feedback are vital documents and must be provided in English and any other languages identified in the Grantee's Title VI Program. Regardless of the funding source, all project outreach materials should include SANDAG's logo and may include the Grantee's logo.

### 6.9.2. Quarterly Progress Reports

Grantees must complete and submit quarterly progress reports that illustrate the Grantee's efforts to make timely progress on their project, including meeting the Performance Measures. SANDAG will provide a standard progress report template that the Grantee must use. Quarterly reports will be due on the last day of the month following the quarter's close. SANDAG will summarize the information in the Grantee's progress report, which will be provided to the TC at their next meeting.

Quarter	Performance Period	Report Due Date	TC Meeting Date
1	7/1 – 9/30	10/31	November
2	10/1 – 12/31	1/31	February

3	1/1 – 3/31	4/30	May
4	4/1 – 6/30	7/31	September

SANDAG will monitor the Grantee's progress and performance against the scope of work and schedule in the grant agreement. If SANDAG believes the Grantee is not making timely progress or is not adhering to the terms of the grant agreement, this information will be reported to the TC. SANDAG will notify the Grantee if it believes the Grantee's performance warrants notification of TC. Poor performance may be grounds for termination of the grant agreement and revocation of the grant, as determined by TC.

### 6.9.3. Financial Management

All Grantees must establish and maintain an accounting system and records that properly accumulate and segregate incurred costs and Matching Funds by line item for the grant. This accounting system may be a separate set of accounts or separate accounts within the framework of an established accounting system. Accounting systems must conform to the Generally Accepted Accounting Principles, enable the determination of incurred costs at interim points of completion, and provide support for reimbursement payment vouchers or invoices. Furthermore, the Grantee's financial management system must ensure effective control over and accountability for all funds, property, and other assets.

Grantees must establish and maintain procedures for determining the allowability of costs according to 2 CFR 200 and the terms of the grant agreement. Grantees must then adhere to these procedures over the Grant Term.

Grantees must maintain all checks, payrolls, invoices, contracts, vouchers, orders, or other accounting documents related to the project so that they may be clearly identified, readily accessible, and available to SANDAG upon request.

### 6.9.4. Invoices

Grant funding is by reimbursement only. Funds will not be disbursed until SANDAG and the Grantee have fully executed a grant agreement, and project expenses incurred by the Grantee before the NTP issuance are not eligible for reimbursement.

To be reimbursed for project expenses, Grantees must submit an invoice packet consisting of an invoice coversheet, expense summary, and invoice history. Grantees are required to use the invoice template provided by SANDAG. Invoices submitted without a corresponding progress report will not be processed. Any third-party consultant or contractor expenses must be accompanied by proof of a competitive procurement or a sole source justification signed by the SANDAG Grants Program Manager to be eligible for reimbursement.

To qualify for reimbursement, the following requirements must be met:

- Staff costs must be submitted with payroll documentation. Personally identifiable information (social security numbers, home addresses, etc.) must not be provided to SANDAG.
- Third-party vendor (consultant or contractor) invoices must be submitted with:
  - Proof of payment, such as a copy of a check provided to the vendor or a printout for the Grantee's financial system showing the funds were dispersed.
  - The vendor's invoice and backup documentation (schedule of values, receipts for expenses)

- Clearly identify all grant-related expenses that include non-related costs. Grantees can highlight, circle, or use a separate document/spreadsheet to differentiate the grant-related costs from other costs unrelated to the grant.
- All receipts and invoices must be detailed, dated, directly related to the project scope of work, and incurred after the NTP date and before the grant expiration date.

SANDAG will make payments for eligible invoices as promptly as SANDAG fiscal procedures permit upon receipt of the Grantee's invoice packet, backup documentation, deliverables, and confirmation by the Flexible Fleets Grant Program Manager that the Grantee is in compliance with the requirements in the grant agreement. SANDAG shall retain 10 percent of the amounts invoiced until the completion of the project.

#### **6.9.5. Matching Funds**

If applicable (see section 6.3), the Grantee must provide a cumulative match over the grant period such that the total Matching Funds amount provided at the end of the grant period is equal to or greater than the Match Percentage required under the grant agreement. Grantees may forfeit the grant award and be responsible for the repayment of grant funds to SANDAG if the cumulative Match Percentage falls below the required percentage or if Grantees fail to provide sufficient documentation of Matching Funds.

#### **6.9.6. Final Progress Report, Invoice, and Project Closeout**

Once the Grantee determines the project is complete, a final progress report and invoice will be submitted to SANDAG. SANDAG will provide the final progress report template the Grantee will be required to use. Final progress reports should detail all completed project activities, challenges, successes, and a description of how the project is expected to continue to support the goals of the Flexible Fleets Grant Program. The report will also include the Performance Measures listed in the grant agreement and document the Grantee's ability to achieve them. The Grantee should provide the deliverables listed in the scope of work with the final progress report. The final progress report should accompany a final invoice, including all remaining project expenses.

Upon receipt of a final progress report, invoice, and deliverables, SANDAG will verify that the full scope of work in the grant agreement was completed and that the Performance Measures were met.

Once SANDAG verifies that the project has been completed and can be closed out, the Grantee will be asked to submit an invoice for the retention amounts withheld. The project will be closed after SANDAG pays the Grantee's retention invoice.

### **6.10. Public Record and Record Retention Policy**

All applications submitted in response to this CFP become the property of SANDAG and are considered a public record. As such, applications and other project-related documentation may be subject to public review per [SANDAG Board Policy No. 015: Records Management](#). Grantees must retain project-related documents for at least three years after receipt of final payment from SANDAG. These documents must be made available to SANDAG upon request.

## 7. Application and Submittal Process

### 7.1. Application Materials

Application materials are available online at <https://www.bidnetdirect.com/sandag/sandag-grants>.

Applicants will submit their completed application with all required signatures by the Application Deadline. An incomplete application may be considered nonresponsive. For an application to be considered complete, it must include all the materials described in the application and be submitted before the Application Deadline.

SANDAG reserves the right to cancel or revise this CFP at any time, for any or no reason, in part or its entirety. If SANDAG revises or cancels the CFP before the Application Deadline, Applicants who have downloaded the CFP materials in BidNet will be notified by email.

Applicants are strongly encouraged to review this CFP and Application materials as early as possible. The deadline to protest the CFP or Application materials is listed in the Timeline. Protests submitted after this deadline will be rejected.

### 7.2. Applicant Webinar, Questions, and Application Assistance

#### 7.2.1. Pre-Application Webinar

SANDAG will host a pre-application webinar for all prospective Applicants to provide an overview of this CFP, the application process, and address any questions. See the Timeline for the date and time of the webinar. SANDAG staff will also provide information and address questions on the eligibility, approval, contracting, and specific requirements of this grant program. This workshop will be held virtually. SANDAG will post the virtual meeting link and other details on BidNet.

#### 7.2.2. CFP Questions

Prospective Applicants must submit questions through the SANDAG web-based vendor portal BidNet, available at <https://www.bidnetdirect.com/sandag/sandag-grants>. Questions submitted after the Question Deadline or outside of BidNet will not be answered. See the Timeline for the deadline to submit questions.

#### 7.2.3. Application Assistance

Prospective Applicants may request a meeting with the SANDAG Grants staff to obtain assistance with an application, including a discussion of a possible project or assistance with utilizing BidNet. See the Timeline for the deadline to request a meeting. Requests submitted after the Deadline will not be accommodated.

### 7.3. Submittal Process

Applicants shall submit application documents via the SANDAG web-based vendor portal BidNet, available at <https://www.bidnetdirect.com/sandag/sandag-grants>. Applications submitted by mail, facsimile, or email in lieu of electronic copies uploaded to the online web-

based portal will not be acceptable and will not be considered. Any application that is missing pages or cannot be opened for any reason may be considered nonresponsive.

Applicants are responsible for fully uploading their entire application before the Application Deadline. It is the Applicant's sole responsibility to contact BidNet to resolve any technical issues related to electronic submittal, including, but not limited to, registering as a vendor, updating password, updating profiles, uploading/downloading documents, and submitting an electronic offer, before the submission deadline. BidNet's Vendor Support team is available Monday-Friday from 5 a.m. to 5 p.m. Pacific Time at (800) 835-4603 or [e-procurementsupport@bidnet.com](mailto:procurementsupport@bidnet.com).

## 8. Application Evaluation Process and Awards

This CFP does not commit SANDAG to award a contract, defray any costs incurred in preparing an application pursuant to this CFP, or procure or contract for work. SANDAG may reject applications without providing the reason(s) underlying the rejection. Failure by SANDAG to award a funding agreement to an Applicant will not result in a cause of action against SANDAG.

### 8.1. Responsiveness and Eligibility Review

#### 8.1.1. Responsiveness Review

SANDAG Grants staff reviews submitted applications to ensure they are responsive to the requirements outlined in this CFP. Below is a list of Application materials that, if not submitted before the Application Deadline, will cause the Application to be deemed nonresponsive. These are items that SANDAG cannot allow the Applicant to provide following the Application Deadline because doing so would harm the integrity of the competitive selection process.

- Application
- Scope, Schedule, and Budget Form

SANDAG Grants staff will notify an Applicant in writing if their application is deemed nonresponsive. Applicants may protest a nonresponsive determination pursuant to the protest procedures (see Protest Procedures). A nonresponsive application will not continue in the competitive selection process unless a protest is filed and substantiated.

#### 8.1.2. Eligibility Review

Following the application submittal period and concurrently with the responsiveness review, SANDAG staff will perform an eligibility review of all Applicants and projects against the eligibility requirements included in this CFP. During the eligibility screening process, SANDAG reserves the right to request additional information and/or clarification from an Applicant, but is not required to do so. Staff may also seek input from a policy advisory committee to determine eligibility. Applications found to be eligible will continue in the competitive selection process.

Any Applicant deemed ineligible or whose project has been deemed ineligible during the eligibility review will be notified in writing when the determination is made. Applicants may protest the eligibility determination pursuant to the protest procedures (see Protest

Procedures). Unless a protest is filed and substantiated, an ineligible application will not continue in the competitive selection process.

### **8.1.3. Notice to Cure Application Deficiencies**

During the responsiveness and eligibility review phase, SANDAG staff also checks eligible and responsive applications for consistency with the Call for Project instructions and accuracy of submitted data and information. SANDAG may provide an Applicant with identified deficiencies an opportunity to correct or cure their applications if those corrections do not impact the competitive selection process. SANDAG staff, in their sole discretion, will determine whether an application can be cured without impacting the competitive selection process.

If staff identifies application deficiencies that an Applicant may cure without impacting the competitive process, SANDAG staff will send the Applicant a written notice to cure the Application deficiencies. This notice identifies the Application deficiencies, states the corrections needed, and provides a deadline for the Applicant to correct the deficiencies. If an Applicant fails to correct the identified deficiencies by the deadline stated in the notice, the Application will be provided to the evaluation committee with a notification that the Applicant failed to address the deficiencies.

### **8.1.4. Pre-Award Risk Assessment**

In accordance with 2 CFR 200.332(c), SANDAG staff will perform a pre-award risk assessment of all eligible and responsive Applications. The risk assessment examines an Applicant's fiscal and operational capabilities to assess the Applicant's risk of fraud and noncompliance with a federal grant award to determine the appropriate monitoring.

A pre-award risk assessment may include a review of the Applicant's financial statements, audit findings, and past performance in managing previous grant awards. To help SANDAG staff perform a pre-award risk assessment, Applicants are required to complete an Applicant Risk Assessment Questionnaire, which is included in the Application. Risk factors may include, but are not limited to the following:

- Successful applicant's prior experience with the same or similar services
- Results of prior audits, including a Single Audit, if applicable
- Substantial changes in personnel or systems
- Extent, timing, and results of SANDAG performance monitoring
- Size, complexity, or newness of the award
- Inherent risks to people or property

SANDAG staff gathers information for the Applicant's risk assessment by reviewing submitted application materials, reviewing public information on the Federal Audit Clearinghouse and the System for Award Management as applicable, and contacting the Applicant for any additional information needed. Based on this information, SANDAG staff then categorize the Applicant as high, medium, or low risk. The results of the pre-award risk assessment may inform the level of monitoring SANDAG conducts of awarded Applicants and could be considered by the Board with the funding recommendations.

## 8.2. Scoring and Awarding of Funds

Responsive and eligible Applications will be scored using the Qualitative and Quantitative Criteria approved by the SANDAG Board of Directors and included in this CFP. There are two sets of scoring criteria: New Projects and Existing Projects. The application used will determine which of the scoring criteria are used.

### 8.2.1. Qualitative Scoring

An external evaluation panel will provide the Qualitative criteria scores for eligible applications. The evaluation panel will typically consist of at least three but no more than five public members who are familiar with the San Diego region and the grant program goals and objectives.

To avoid conflicts of interest, all evaluation panel members will be screened to be sure they do not have an affiliation with any of the Applicants or proposed projects. Individuals who work for a private company that could potentially receive a future contract from a Flexible Fleets Grant Program Applicant due to the project being selected for funding will not be permitted to serve as evaluators.

### 8.2.2. Quantitative Scoring

SANDAG Grants and Data Science staff will provide the Quantitative Criteria scores for each project. Points associated with Quantitative Criteria undergo a quality assurance/quality control (QA/QC) review to ensure that data used in the Quantitative scoring process are accurate and points were awarded appropriately.

### 8.2.3. Calculation of Total Application Scores

An application's Average Qualitative Score will be calculated by summing all evaluator scores for that application and dividing by the number of evaluators. The application's Average Qualitative Score will then be added to the Quantitative scores, producing the Total Application Score.

### 8.2.4. Tiebreakers

If two or more projects receive the same Total Application Score, the following methodology in descending order will be used as the tiebreaker:

- Highest score on New Projects Criteria #5 Feasibility / Existing Projects Criteria #5 Performance
- Highest score on Criteria #2 Connectivity
- Highest score on Criteria #1 Financial Sustainability

### 8.2.5. Minimum Total Application Score

To ensure grant funds support quality projects, a project must receive a Total Application Score of at least 60 points to be eligible for funding.

### 8.2.6. Funding Recommendations

Following the scoring process outlined above, applications for both Project Types will be placed in descending Total Application Score order (from the highest to lowest). Projects will be recommended to receive funding based on this order, regardless of the Project Type. As previously stated, partial awards may be recommended (see the section entitled “Partial Awards”).

SANDAG will recommend a list of projects to the Board of Directors that are financially constrained by the amount of funding available.

### 8.2.7. Partial Awards

Given the competitive nature of the grant program and the finite amount of funds available through this CFP, Applicants may receive partial awards. Additionally, SANDAG may choose to roll over any remaining funds not awarded through this CFP to a future CFP. SANDAG handles partial awards differently based on the scalability of a project. SANDAG, at its sole discretion, will determine whether a project is Scalable or Non-Scalable.

Applicants whose projects are recommended for partial award and are Scalable will be required to work with SANDAG staff before grant agreement execution to alter the scope of work, budget, and schedule submitted as a part of the application to reflect a reduced scope of work.

Applicants whose projects are recommended for partial award and cannot be scaled will be asked if they would like to accept the partial funding award with the condition that the entire project, as proposed in the scope of work included in the application, must be completed. Applicants will be required to contribute additional Matching Funds than listed in their application to complete the project scope of work.

If an Applicant cannot provide the necessary Matching Funds and declines the partial funding award, the award will be offered consistent with the process identified in the section entitled “Application Evaluation Process.” If no Applicant accepts the funding, the funding may be rolled over to future funding cycles.

### 8.2.8. Notice of Intent to Award

Once the funding recommendations have been finalized, staff will email all Applicants a Notice of Intent to Award. The Notice will contain the detailed scores of each Application and the funding recommendations that will be brought to the policy advisory committee(s) and Board of Directors. See the Timeline for the anticipated date the Notice of Intent to Award will be issued.

### 8.2.9. Protests

SANDAG grant program protest procedures may be obtained online at <https://www.sandag.org/funding/grant-programs>.



## 8.2.10. Approval of the Funding Recommendations and Contingency List

The funding recommendations will be presented to the relevant policy advisory committee for recommendation to the Board of Directors. The Board of Directors will then be asked to approve the proposed funding recommendations.

## 9. Grant Agreement Execution

If awarded funds, an Applicant will enter into a grant agreement with SANDAG for the approved project scope of services and become a “Grantee.”

A sample grant agreement is included with the CFP. Applicants are encouraged to review the sample grant agreement within their organization before applying so they are fully aware of the requirements they will have to comply with during the Grant Term. Aside from any potential errors or omissions, the terms of the grant agreement will be substantially the same as those in the sample grant agreement and are non-negotiable.

### 9.1. Insurance Certificates

Following the recommendation of the proposed grant awards by the policy advisory committee, each non-public agency Grantee will receive an email from myCOI, the SANDAG insurance tracking system. The Grantee shall follow the instructions contained in the email and complete the online registration. Upon completion of registration, myCOI will request proof of insurance directly from the Grantee’s insurance agents. SANDAG will not provide the grant agreement to the Grantee to sign until the Grantee is registered with myCOI, compliant certificates of insurance and endorsements have been received, and SANDAG has deemed the Grantee compliant with the insurance requirements.

### 9.2. Title VI Program

Grantees are required to develop a Title VI Program, have it approved by their governing body, and submit it to SANDAG for review. Once the Program has been accepted by SANDAG, the grant agreement signature stage can begin.

### 9.3. Grant Agreement Signature

SANDAG will prepare the grant agreement utilizing the sample provided with the CFP. Once the draft has been approved by SANDAG staff for signature, it will be sent electronically to the person listed in the grant application. Failure by the Grantee to sign and return the grant agreement within 45 days of receiving the grant agreement from SANDAG may result in revocation of the grant award. See the section entitled “SANDAG Board Policy No. 035.”

### 9.4. Notice to Proceed

Grantees cannot begin work on their grant-funded project until they receive a written NTP from SANDAG. The NTP specifies the date the Grantee can begin work on the project. Any work performed before the NTP is not eligible for reimbursement.

## 9.5. Federal Subaward Report

Consistent with FFATA, SANDAG will report information on each grant subaward over \$30,000 to the FFATA Subaward Reporting System (FSRS) by the end of the month in which the grant agreements have been executed.

DRAFT



## Draft Final Flexible Fleets Grant Program Performance Metrics

Below are the performance metrics that will be used to measure a project's success in meeting the Flexible Fleets grant program goals and objectives. The metrics are organized into categories, and the applicable mode(s) are also provided. Applicants may also include their own performance metric(s) in the grant application, in addition to those listed below, but they must be quantifiable and should support evaluating the goals and objectives of the proposed project.

Applicants can refer to the Federal Transit Administration's [Mobility Performance Metrics for Integrated Mobility and Beyond](#) and Transportation for America's [Shared Mobility Playbook Performance Metrics](#) for additional guidance and examples.

Grantees will be required to provide quarterly updates on their efforts to meet each metric included in their grant agreement and will provide a post-delivery measure (once the Flexible Fleets Grant Program project agreement ends) for each metric included in their grant agreement as part of the final project report.

### **Modes of Flexible Fleets and Acronyms**

- Microtransit (MT)
- NEV Shuttle (NEV)
- Micromobility, such as bike/scooter share (MM)
- Ridehail/Rideshare (RS)
- Carshare (CS)

### **Performance Metrics Categories**

- Productivity
- Connectivity
- Community Engagement and Accessibility
- Cost Effectiveness

## Performance Metrics

#	Category	Metric	Definition	Unit of Measurement	Applicable Mode(s)	Notes (If Applicable)
1	Productivity	Trip Denial Rate	The number of requested trips that are denied by the operator divided by the total trip requests. Trip denials are due to insufficient capacity to meet demand at the time of booking, or the driver cancels.	Per Month	MT, NEV, RS	Operator cancellations/denials may also be due to vehicle failure, dispatch error, safety concerns, or rider violations.  Tracking this metric enables greater control over service quality and can inform when service adjustments should be made.
2	Productivity	Vehicle Utilization	Divide the actual number of seats used by the number of seats available in each vehicle multiplied by 100. Averages of each vehicle.	Per Month	MT, NEV, RS, CS	Vehicle utilization compiles performance data based on the number of boardings and vehicles in service per hour.
3	Productivity	Device Utilization	The number of total trips divided by the reported number of devices in fleet. Averages of each device.	Per Month	MM	Device utilization compiles performance data based on the number of rides and devices in service per hour.
4	Productivity	Total Ridership	The number of riders using the service	Per Month	MT, NEV, MM, RS, CS	
5	Productivity	Average Wait Times	The average time spent waiting for a pickup after a ride is requested	Per Month	MT, NEV, RS	Tracking the correlation between the rider's disability status (disabled or non-disabled) and wait time length is also encouraged.
6	Connectivity	Transit Connection Trips	Number of pickups and drop-offs to transit stops and stations	Per Month	MT, NEV, MM, RS, CS	
7	Connectivity	Percentage of Shared Rides	Number of pooled/shared trips divided by the total trips	Per Month	MT, NEV, RS, CS	
8	Community Engagement and Accessibility	Wheelchair-Accessible Trip	Number of wheelchair trips provided compared to the number of wheelchair-	Per Month	MT, NEV, RS, CS	Allows program administrators to evaluate the effectiveness of the ADA Option for disabled riders.

		Fulfillment	accessible trips requested			
9	Cost Effectiveness	Average Trip Cost	Monthly program costs, divided by the monthly number of trips	Per Month	MT, NEV, MM, RS, CS	
10	Cost Effectiveness	Farebox Recovery Ratio	Ratio of operating expenses which are met by the fares paid by passengers.	Per Month	MT, NEV, MM, RS, CS	Applicable only if it is a fare-service

## I. New Projects Scoring Criteria and Rubric

Projects will be scored based on the Applicant's responses to the Scoring Criteria below. The Scoring Rubric is a guide for SANDAG staff and the Evaluation Panel to assist with awarding points based on the Scoring Criteria. The Objective criteria (points calculated by SANDAG's Department of Data Science or Grants staff) are marked with an asterisk (\*).

### A. Scoring Criteria

No.	CRITERIA	POINTS POSSIBLE
<b>1.</b>	<b>FINANCIAL SUSTAINABILITY</b>	<b>20</b>
<b>1.1</b>	<b>Stable Future Funding Sources*</b>  Does the Applicant propose stable, future funding sources to fund the project for one or more years beyond the grant term?	10
<b>1.2</b>	<b>Strategy to Attain Future Funding</b>  Does the Applicant have a feasible strategy for attaining future funding for the Flexible Fleet project?	10
<b>2.</b>	<b>CONNECTIVITY</b>	<b>20</b>
	The Applicant should demonstrate either: <ul style="list-style-type: none"> <li>• How the service will operate in an area lacking existing bus and/or rail services.</li> <li>• How the service will connect riders to existing bus and/or rail services in the area.</li> </ul>	
<b>3.</b>	<b>ENGAGEMENT</b>	<b>15</b>
	Does the Applicant: <ul style="list-style-type: none"> <li>• Identify engagement goals?</li> <li>• Put forth a plan for engaging community members and organizations throughout the program?</li> <li>• Demonstrate how hard-to-reach populations (disabled, senior residents, etc.) will be engaged?</li> <li>• Propose an effective marketing and engagement strategy that includes specific methods to promote sustainable transportation choices?</li> <li>• Identify a plan to survey riders and community members before the program launch and throughout the program?</li> </ul>	15

<b>4.</b>	<b>ACCESSIBILITY</b>	<b>15</b>
	How well does the Applicant demonstrate that they will continuously implement measures that ensure the service is accessible to all community members, and demonstrate that the service improves access to basic needs and opportunities?	15
<b>5.</b>	<b>FEASIBILITY</b>	<b>20</b>
	<ul style="list-style-type: none"> <li>Does the Applicant identify a project mode?</li> <li>Does the Applicant include a well-thought-out approach to how they will deliver the project?</li> <li>Is the project schedule realistic and feasible?</li> <li>Does the Applicant identify proper staff and technical capacity for project oversight?</li> <li>Does the Applicant identify a plan for procurement of goods and services?</li> <li>Does the funding amount request match the scope (vehicles, infrastructure, operations platform, etc.)?</li> <li>Does the Applicant identify a service zone that is realistic and feasible?</li> <li>Does the Applicant include a map of the proposed service area?</li> <li>Is the program fleet size feasible with the proposed schedule, budget, and service zone?</li> </ul>	
<b>6.</b>	<b>MATCHING FUNDS*</b>	<b>10</b>
	Points will be awarded based on the scale provided in the Scoring Rubric.	
	<b>TOTAL</b>	<b>100</b>

## B. Scoring Rubric

Below is a general scoring guide that provides more specific language based on a project's ability to meet the evaluation criteria.

Term	Definition
Clearly and convincingly	to a considerable extent, with substantive documentation or evidence
Sufficiently	to a satisfactory extent, with adequate documentation or evidence
Mostly	to a large extent, with general documentation or evidence
Partially	to a limited extent, with incomplete documentation or evidence

Minimally	to a small extent and without documentation or evidence
Does Not Demonstrate	unable to address criterion, even to a minimal extent

## 1. FINANCIAL SUSTAINABILITY

Up to 20 points possible

### 1.1. Stable Future Funding Sources\*

Up to 10 points possible

Applicants will receive points based on the availability of stable future funding to sustain the service for one or more years beyond the grant term. Stable funding is a reliable, predictable, and sufficient source of revenue that is not at high-risk.

Examples of stable project funding sources may include multi-year general fund allocation, long-term contractual cost-sharing agreements with private partners, parking fee revenue, and transit operations funding. Please note that a future competitive grant is not considered a stable funding source. To be considered stable, the funding must already be secured, or the Applicant has the authority to authorize the funding in the future.

\*NOTE: SANDAG Grants staff will calculate the points awarded for this criterion based on the Applicant's responses in the grant application.

Applicant Response	Points
The application includes stable future funding for four to five years following the end of the grant term.	10 points
The application includes stable future funding for three to four years following the end of the grant term.	8 points
The application includes stable future funding for two to three years following the end of the grant term.	6 points
The application includes stable future funding for one to two years following the end of the grant term.	4 points
The application includes stable future funding for seven months to one year following the end of the grant term.	2 points
The application includes stable future funding for six months following the end of the grant term.	1 point
The application does not include stable future funding sources for at least 6 months beyond the grant term.	0 points

### 1.2. Strategy to Attain Future Funding

Up to 10 points possible

Applicants should provide a strategy for securing a stable funding source following the end of the grant term. For example, the application should detail the steps needed to form a



parking district and generate revenue through parking fees or the required steps to allocate general funds to the program annually. Applicants should also identify a timeline for obtaining each future funding source, how long the funding could be available, and the likelihood that the Applicant will be able to secure that funding.

Applicant Response	Points
Clearly and convincingly demonstrates a feasible strategy for the Applicant to financially sustain the Flexible Fleet project long-term and provides substantive documentation or evidence.	10 points
Sufficiently demonstrates a feasible strategy for the Applicant to financially sustain the Flexible Fleet project long-term and provides adequate documentation or evidence.	8 points
Mostly demonstrates a feasible strategy for the Applicant to financially sustain the Flexible Fleet project long term and provides general documentation or evidence.	6 points
Partially demonstrates a feasible strategy for the Applicant to financially sustain the Flexible Fleet project long-term but provides incomplete documentation or evidence.	4 points
Minimally demonstrates a feasible strategy for the Applicant to financially sustain the Flexible Fleet project long-term and provides little to no documentation or evidence.	2 points
Unable to address criterion, even to a minimal extent	0 points

## 2. CONNECTIVITY

Up to 20 points possible

The Applicant should demonstrate either:

- How the service will operate in an area lacking existing bus and/or rail services.
  - The **Applicant could also demonstrate how the project will fill an existing transit-need gap. For example, providing service during existing transit's off-operation days/hours, providing access to destinations not currently served by transit, or providing access when transit is infrequent.**
- How the service will connect riders to existing bus and/or rail services in the area.
  - The Applicant should also explain how the project will integrate with transit in other ways besides the service area. For example, free trips to transit stops/stations, service is staged or docked at transit stops/stations, and signage or other advertising of the service at transit stops/stations.

Applicant Response	Points
Clearly and convincingly demonstrates how the project will integrate with the existing transit network or fill an existing transit-need gap, and the application provides substantive documentation or evidence.	20 points

Sufficiently demonstrates how the project will integrate with the existing transit network or fill an existing transit-need gap, and the application provides adequate documentation or evidence.	16-19 points
Mostly demonstrates how the project will integrate with the existing transit network or fill an existing transit-need gap, and the application provides general documentation or evidence.	11-15 points
Partially demonstrates how the project will integrate with the existing transit network or fill an existing transit-need gap, but the application provides incomplete documentation or evidence.	6-10 points
Minimally demonstrates how the project will integrate with the existing transit network or fill an existing transit-need gap, and the application provides incomplete documentation or evidence.	1-5 points
Unable to address criterion, even to a minimal extent.	0 points

### 3. ENGAGEMENT

Up to 15 points possible

An engagement plan is a document that outlines strategies for public participation and outreach in a community. It includes a timeline, assigned roles, and specific project strategies that may impact the community. An engagement plan aims to involve the public in decision-making, giving local knowledge and public opinion more weight. Examples of methods used in engagement plans include surveys/questionnaires, presentations to community members to gain feedback, and online media engagement tools. The Applicant should include the following in its response:

- Define the goals and purpose of the engagement plan
- Identify the target community to be engaged, including community organizations
- Include a strategy that identifies the methodology of how the service meets the specific needs of the community
- Propose an effective marketing and engagement strategy that includes specific methods to promote sustainable transportation choices.
- Determine engagement methods and strategies, including how hard-to-reach populations (disabled, senior residents, etc.) will be engaged. (Pre-launch and continuous community surveying are required.)
- Develop an action plan to continue periodic engagement. This should include surveying riders and community members throughout the service delivery and incorporating feedback to operations adjustments.
- How the Applicant will evaluate and measure how the service meets the needs of the community

The Applicant should also demonstrate how the community's feedback will be incorporated into project goals and service operations. Examples include expanding the service area to

reach a community college, extending service hours on a particular day(s) of the week, and revising the operations plan on a seasonal basis.

Applicant Response	Points
Clearly and convincingly demonstrates how the Applicant will accomplish successful project community engagement, and the application provides substantive documentation or evidence.	15 points
Sufficiently demonstrates how the Applicant will accomplish successful project community engagement, and the application provides adequate documentation or evidence.	11-14 points
Mostly demonstrates how the Applicant will accomplish successful project community engagement, and the application provides general documentation or evidence.	8-10 points
Partially demonstrates how the Applicant will accomplish successful project community engagement but the application provides incomplete documentation or evidence.	4-7 points
Minimally demonstrates how the Applicant will accomplish successful project community engagement, and the application provides little or no documentation or evidence.	1-3 points
Unable to address criterion, even to a minimal extent.	0 points

#### 4. ACCESSIBILITY Up to 15 points possible

Applicants should demonstrate that they will continuously implement measures that ensure the service is accessible to all community members and demonstrate that the service improves access to basic needs and opportunities.

Examples of accessible measures include: providing a language assistance service, ride booking options for unbanked riders and riders without access to a smartphone/internet, , service hours that accommodate nontraditional work schedules, targeted outreach to hard-to-reach populations (disabled, senior populations, etc.), and other measures that improve access to basic needs and opportunities.

Please note that providing an ADA-accessible Flexible Fleet service is a requirement of this program.

Applicant Response	Points
Clearly and convincingly demonstrates how accessibility will continuously be implemented throughout the project, and the application provides substantive documentation or evidence.	15 points
Sufficiently demonstrates how accessibility will continuously be implemented throughout the project and the application provides adequate documentation or evidence.	11-14 points

Mostly demonstrates how accessibility will continuously be implemented throughout the project, and the application provides general documentation or evidence.	7-10 points
Partially demonstrates how accessibility will continuously be implemented throughout the project, but the application provides incomplete documentation or evidence.	4-6 points
Minimally demonstrates how accessibility will continuously be implemented throughout the project, and the application provides little or no documentation or evidence.	1-3 points
Unable to address criterion, even to a minimal extent.	0 points

## 5. FEASIBILITY

Up to 20 points possible

Applicants will receive points based on how feasible the project is, as demonstrated by the proposed project scope of work, schedule, and budget. The following factors should be considered.

- Does the Applicant identify a project mode?
- Does the Applicant include a well-thought-out approach to how they will deliver the project?
- Is the project schedule realistic and feasible?
- Does the Applicant identify proper staff and technical capacity for project oversight?
- Does the Applicant identify a plan for procurement of goods and services?
- Does the funding amount requested align with the scope (vehicles, infrastructure, operations platform, etc.)?
- Does the Applicant identify a service area that is realistic and feasible?
  - The effectiveness of a Flexible Fleet deployment depends on a series of demand and service design factors: population/job density, transit frequency, transit "deserts," target population demographics, and multiple trip types. For more information, refer to Chapter 4 of the [Flexible Fleets Implementation Strategic Plan](#).
- Is the program fleet size feasible with the proposed schedule, budget, and service area?
  - Consider capacity to meet demand when planning a Flexible Fleets service area. For example, a small fleet with a limited project budget is not right-sized to a large service zone with high ridership potential/demand.

Applicant Response	Points
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Clearly and convincingly demonstrates how the project scope of work, schedule, and budget are feasible and realistic, and the application provides substantive documentation or evidence.	20 points
Sufficiently demonstrates how the project scope of work, schedule, and budget are feasible and realistic, and the application provides adequate documentation or evidence.	16-19 points
Mostly demonstrates how the project scope of work, schedule, and budget are feasible and realistic and the application provides general documentation or evidence.	11-15 points
Partially demonstrates how the project scope of work, schedule, and budget are feasible and realistic, but the application provides incomplete documentation or evidence.	6-10 points
Minimally demonstrates how the project scope of work, schedule, and budget are feasible and realistic, and the application provides incomplete documentation or evidence.	1-5 points
Unable to address criterion, even to a minimal extent.	0 points

## 6. MATCHING FUNDS\*

Up to 10 points possible

\*NOTE: SANDAG Grants staff will calculate the points awarded for this criterion based on the Applicant's responses in the grant application.

Points for Matching Funds will be awarded based on the following scales. The Match percentage is derived by dividing the total Matching Funds provided in the grant application by the sum of the total Flexible Fleets Pilot Program grant requested and the total Matching Funds listed in the grant application.

Applications that designate staff time, donations, volunteered services, or other in-kind contributions are obligated to fulfill their commitment within the grant term period.

Percentage of Matching Funds	Points
30.01% - 40.00% and above of the Total Project Cost	10 points
25.01% - 30.00% of the Total Project Cost	8 points
20.01% - 25.00% of the Total Project Cost	6 points
15.01% - 20.00% of the Total Project Cost	4 points
11.48% - 15.00% of the Total Project Cost	2 points
Below 11.47% of the Total Project Cost	0 points

## I. Existing Projects Scoring Criteria and Rubric

Projects will be scored based on the Applicant's responses to the Scoring Criteria below. The Scoring Rubric is a guide for SANDAG staff and the Evaluation Panel to assist with awarding points based on the Scoring Criteria. The Objective criteria (points calculated by SANDAG's Department of Data Science or Grants staff) are marked with an asterisk (\*).

### A. Scoring Criteria

No.	CRITERIA	POINTS POSSIBLE
<b>1.</b>	<b>FINANCIAL SUSTAINABILITY</b>	<b>20</b>
<b>1.1</b>	<b>Stable Future Funding Sources*</b>  Does the Applicant propose stable, future funding sources to fund the project for one or more years beyond the grant term?	10
<b>1.2</b>	<b>Strategy to Attain Future Funding</b>  Does the Applicant have a feasible strategy for attaining future funding for the Flexible Fleet project?	10
<b>2.</b>	<b>CONNECTIVITY</b>	<b>20</b>
	The Applicant should demonstrate either: <ul style="list-style-type: none"> <li>How the service will operate in an area lacking existing bus and/or rail services.</li> <li>How the service will connect riders to existing bus and/or rail services in the area.</li> </ul>	
<b>3.</b>	<b>ENGAGEMENT</b>	<b>15</b>
<b>3.1</b>	<b>Previous and Continued Engagement</b>  Does the Applicant: <ul style="list-style-type: none"> <li>Provide the goals and purpose of the existing engagement plan?</li> <li>Provide the existing engagement plan's target audience. If applicable, include if hard-to-reach populations (disabled, senior residents, etc.) were/are engaged?</li> <li>Provide the engagement methods and strategies that were/are used for the existing service?</li> <li>Revise the existing engagement plan or develop an action plan to continue periodic engagement?</li> </ul>	10

	<ul style="list-style-type: none"> <li>Explain how the Applicant has and will continue to evaluate and measure how the service meets the needs of the community?</li> </ul>	
<b>3.2</b>	<b>Effective Engagement Examples*</b>  Does the applicant provide at least two examples of effective engagement from the existing program that demonstrate how community feedback informed service planning or operations adjustments?	5
<b>4.</b>	<b>ACCESSIBILITY</b>	<b>15</b>
	How well does the Applicant demonstrate that they will continuously implement measures that ensure the service is accessible to all community members, and demonstrate that the service improves access to basic needs and opportunities?	15
<b>5.</b>	<b>PERFORMANCE*</b>	<b>20</b>
	Points will be awarded based on the scale provided in the Scoring Rubric and the proposed service mode.	
<b>5.1</b>	<b>Existing Microtransit and NEV Shuttle Services Program Metric*</b>	20
<b>5.2-5.4</b>	<b>Metrics for Other Modes of Existing Flexible Fleets*</b> (included in Attachment 6)	20/each mode
<b>6.</b>	<b>MATCHING FUNDS*</b>	<b>10</b>
	Points will be awarded based on the scale provided in the Scoring Rubric.	10
	<b>TOTAL</b>	<b>100</b>

## B. Scoring Rubric

Below is a general scoring guide that provides more specific language based on a project's ability to meet the evaluation criteria.

Term	Definition
Clearly and convincingly	to a considerable extent, with substantive documentation or evidence
Sufficiently	to a satisfactory extent, with adequate documentation or evidence
Mostly	to a large extent, with general documentation or evidence
Partially	to a limited extent, with incomplete documentation or evidence
Minimally	to a small extent and without documentation or evidence

Does Not Demonstrate	unable to address criterion, even to a minimal extent
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## 1. FINANCIAL SUSTAINABILITY

Up to 20 points possible

### 1.1. Stable Future Funding Sources\*

Up to 10 points possible

Applicants will receive points based on the availability of stable future funding to sustain the service for one or more years beyond the grant term. Stable funding is a reliable, predictable, and sufficient source of revenue that is not at high-risk.

Examples of stable project funding sources may include multi-year general fund allocation, long-term contractual cost-sharing agreements with private partners, parking fee revenue, and transit operations funding. Please note that a future competitive grant is not considered a stable funding source. To be considered stable, the funding must already be secured, or the Applicant has the authority to authorize the funding in the future.

\*NOTE: SANDAG Grants staff will calculate the points awarded for this criterion based on the Applicant's responses in the grant application.

Applicant Response	Points
The application includes stable future funding for four to five years following the end of the grant term.	10 points
The application includes stable future funding for three to four years following the end of the grant term.	8 points
The application includes stable future funding for two to three years following the end of the grant term.	6 points
The application includes stable future funding for one to two years following the end of the grant term.	4 points
The application includes stable future funding for seven months to one year following the end of the grant term.	2 points
The application includes stable future funding for six months following the end of the grant term.	1 point
The application does not include stable future funding sources for at least 6 months beyond the grant term.	0 points

### 1.2. Strategy to Attain Future Funding

Up to 10 points possible

Applicants should provide a strategy for securing a stable funding source following the end of the grant term. For example, the application should detail the steps needed to form a parking district and generate revenue through parking fees or the required steps to allocate general funds to the program annually. Applicants should also identify a timeline for



obtaining each future funding source, how long the funding could be available, and the likelihood that the Applicant will be able to secure that funding.

Applicant Response	Points
Clearly and convincingly demonstrates a feasible strategy for the Applicant to financially sustain the Flexible Fleet project long-term and provides substantive documentation or evidence.	10 points
Sufficiently demonstrates a feasible strategy for the Applicant to financially sustain the Flexible Fleet project long-term and provides adequate documentation or evidence.	8 points
Mostly demonstrates a feasible strategy for the Applicant to financially sustain the Flexible Fleet project long term and provides general documentation or evidence.	6 points
Partially demonstrates a feasible strategy for the Applicant to financially sustain the Flexible Fleet project long-term but provides incomplete documentation or evidence.	4 points
Minimally demonstrates a feasible strategy for the Applicant to financially sustain the Flexible Fleet project long-term and provides little to no documentation or evidence.	2 points
Unable to address criterion, even to a minimal extent	0 points

## 2. CONNECTIVITY

Up to 20 points possible

The Applicant should demonstrate either:

- How the service will operate in an area lacking existing bus and/or rail services.
  - The Applicant could also demonstrate how the project will fill an existing transit-need gap. For example, providing service during existing transit's off-operation days/hours, providing access to destinations not currently served by transit, or providing access when transit is infrequent.
- How the service will connect riders to existing bus and/or rail services in the area.
  - The Applicant should also explain how the project will integrate with transit in other ways besides the service area. For example, free trips to transit stops/stations, service is staged or docked at transit stops/stations, and signage or other advertising of the service at transit stops/stations.

Applicant Response	Points
Clearly and convincingly demonstrates how the project will integrate with the existing transit network or fill an existing transit-need gap, and the application provides substantive documentation or evidence.	20 points

Sufficiently demonstrates how the project will integrate with the existing transit network or fill an existing transit-need gap, and the application provides adequate documentation or evidence.	16-19 points
Mostly demonstrates how the project will integrate with the existing transit network or fill an existing transit-need gap, and the application provides general documentation or evidence.	11-15 points
Partially demonstrates how the project will integrate with the existing transit network or fill an existing transit-need gap, but the application provides incomplete documentation or evidence.	6-10 points
Minimally demonstrates how the project will integrate with the existing transit network or fill an existing transit-need gap, and the application provides incomplete documentation or evidence.	1-5 points
Unable to address criterion, even to a minimal extent.	0 points

### 3. ENGAGEMENT

#### 3.1. Previous and Continued Engagement

Up to 10 points possible

An engagement plan is a document that outlines strategies for public participation and outreach in a community. It includes a timeline, assigned roles, and specific project strategies that may impact the community. An engagement plan aims to involve the public in decision-making, giving local knowledge and public opinion more weight. Examples of methods used in engagement plans include surveys/questionnaires, presentations to community members to gain feedback, and online media engagement tools.

Applications should identify how their previous or current engagement plan and efforts incorporate(d) the following considerations and tactics. If the previous or current plan does not include the following considerations and tactics, the Applicant should demonstrate how they will be included in the existing plan for continuous engagement:

- Provide the goals and purpose of the existing engagement plan
- Provide the existing engagement plan's target audience. If applicable, include if hard-to-reach populations (disabled, senior residents, etc.) were/are engaged
- Provide the engagement methods and strategies that were/are used for the existing service.
- Revise the existing engagement plan or develop an action plan to continue periodic engagement. This should include surveying riders and community members throughout the service delivery and incorporating feedback to operations adjustments.
- Explain how the Applicant has and will continue to evaluate and measure how the service meets the needs of the community

The Applicant should also demonstrate how the community's feedback is and will continue to be incorporated into project goals and service operations. Examples include expanding the service area to reach a community college, extending service hours on a particular day(s) of the week, and revising the operations plan on a periodic seasonal basis.

Applicant Response	Points
Clearly and convincingly demonstrates how the Applicant has and will continue to accomplish successful project community engagement, and the application provides substantive documentation or evidence.	10 points
Sufficiently demonstrates how the Applicant will accomplish successful project community engagement, and the application provides adequate documentation or evidence.	8 points
Mostly demonstrates how the Applicant has and will continue to accomplish successful project community engagement, and the application provides general documentation or evidence.	6 points
Partially demonstrates how the Applicant has and will continue to accomplish successful project community engagement, but the application provides incomplete documentation or evidence.	4 points
Minimally demonstrates how the Applicant has and will continue to accomplish successful project community engagement, and the application provides little or no documentation or evidence.	2 points
Unable to address criterion, even to a minimal extent.	0 points

### 3.2. Effective Engagement Examples\*

Up to 5 points possible

Combined with effective engagement, program managers can make periodic service operations adjustments to Flexible Fleets service to address feedback received from riders and community members. Applicants should explain how feedback informed service operations.

\*NOTE: SANDAG Grants staff will calculate the points awarded for this criterion based on the Applicant's responses in the grant application.

Applicant Response	Points
The Applicant provided at least two examples that demonstrate how community feedback informed service planning or operations adjustments.	5 points
The Applicant provided one example that demonstrates how community feedback informed service planning or operations adjustments.	2.5 points
The Applicant did not submit an example of effective engagement from the existing program.	0 points

#### 4. ACCESSIBILITY

Up to 15 points possible

Applicants should demonstrate that they will continuously implement measures that ensure the service is accessible to all community members and demonstrate that the service improves access to basic needs and opportunities.

Examples of accessible measures include: providing a language assistance service, ride booking options for unbanked riders and riders without access to a smartphone/internet, , service hours that accommodate nontraditional work schedules, targeted outreach to hard-to-reach populations (disabled, senior populations, etc.), and other measures that improve access to basic needs and opportunities.

Please note that providing an ADA-accessible Flexible Fleet service is a requirement of this program.

Applicant Response	Points
Clearly and convincingly demonstrates how accessibility will continuously be implemented throughout the project, and the application provides substantive documentation or evidence.	15 points
Sufficiently demonstrates how accessibility will continuously be implemented throughout the project and the application provides adequate documentation or evidence.	11-14 points
Mostly demonstrates how accessibility will continuously be implemented throughout the project, and the application provides general documentation or evidence.	7-10 points
Partially demonstrates how accessibility will continuously be implemented throughout the project, but the application provides incomplete documentation or evidence.	4-6 points
Minimally demonstrates how accessibility will continuously be implemented throughout the project, and the application provides little or no documentation or evidence.	1-3 points
Unable to address criterion, even to a minimal extent.	0 points

#### 5. PERFORMANCE\*

Up to 20 points possible

\*NOTE: SANDAG Grants staff will calculate the points awarded for this criterion based on the Applicant's responses in the grant application.

Applicants will receive points based on how well the existing service performed, measured by performance metrics. The following productivity metrics demonstrate the success of the program and the benefit of its continuation. Applicants will only be scored on the metric that is relevant to their service mode. The point rubrics were produced based on industry performance data and standards for each mode.

### 5.1. Existing Microtransit and NEV Shuttle Services Program Metric: Trip Denial Rate\*

The trip denial rate is the number of requested trips that are denied by the operator divided by total trip requests. Trip denials are due to insufficient capacity to meet demand at the time of booking, or the driver cancels. Trip denials do not include trips canceled by the rider or no-shows. Tracking the rate of trip denials enables greater control over service quality and demonstrates the capacity to meet demand. This should be calculated as the monthly average over a 6-month period within the operations window.

Applicant Response	Points
The average monthly trip denial rate is less than 5%	20 points
The average monthly trip denial rate is 5-15%	15 points
The average monthly trip denial rate is 15.01-25%	10 points
The average monthly trip denial rate is greater than 25%	0 points

### 5.2. Existing Micromobility Services Program Metric - Provided in Att. 6

### 5.3. Existing Carshare Services Program Metric - Provided in Att. 6

### 5.4. Existing Rideshare/Ridehail Services Program Metric - Provided in Att. 6

## 6. MATCHING FUNDS\*

Up to 10 points possible

\*NOTE: SANDAG Grants staff will calculate the points awarded for this criterion based on the Applicant's responses in the grant application.

Points for Matching Funds will be awarded based on the following scales. The Match percentage is derived by dividing the total Matching Funds provided in the grant application by the sum of the total Flexible Fleets Pilot Program grant requested and the total Matching Funds listed in the grant application.

Applications that designate staff time, donations, volunteered services, or other in-kind contributions are obligated to fulfill their commitment within the grant term period.

Percentage of Matching Funds	Points
30.01% - 40.00% and above of the Total Project Cost	10 points
25.01% - 30.00% of the Total Project Cost	8 points
20.01% - 25.00% of the Total Project Cost	6 points
15.01% - 20.00% of the Total Project Cost	4 points
11.48% - 15.00% of the Total Project Cost	2 points
11.47% of the Total Project Cost	0 points

## Flexible Fleets Grant Program

### Summary of Feedback and Revisions

Source	Feedback Received	Revisions
Working Groups/ Transportation Committee	Eligible projects should include existing services and services previously funded by SANDAG.	Updated Call for Projects (Att. 1) to allow funding for existing projects and created the Existing Projects evaluation criteria (Att. 4).
Working Groups	Prioritize projects that provide services to transit deserts, rural areas, and military bases.	Revisions were made to Criteria No. 2 to clarify language. Providing access to the existing transit network and providing service in an area lacking transit will be scored equally. Revised criteria name.
Working Groups/ Transportation Committee	Refine Criteria No. 4 so that all populations have equal representation.	Language revisions were made to Criteria No. 4.
Working Groups	Require applicants to identify robust engagement plans and tactics.	Revisions were made to Criteria No. 3.
Working Groups/ Transportation Committee	Encourage projects that are collaborative efforts among multiple agencies (i.e. jurisdictions and NCTD/MTS).	None. Collaboration is encouraged but not required.
Working Groups/ Transportation Committee	Support for funding planning studies.  Remove non-federal match requirement.	Updated Call for Projects (Att. 1) and Criteria No. 6 to allow in-kind contributions to be an eligible match source. This includes time spent on planning the service.
Transportation Committee	Support for regional representation, including military, unincorporated, and disadvantaged communities.	None. Staff have engaged these communities in program development and all communities are eligible to apply.
Transportation Committee	Support for allowing existing projects to be eligible but applicants should provide proven success factors.	Existing Projects evaluation criteria (Att. 4) include Performance Measures (Criteria No. 5).
Transportation Committee	Consider a \$500,000 maximum for existing projects to ensure more awards.	Updated Call for Projects (Att. 1) to set the maximum award for existing projects at \$500,000.
Working Groups	General need for additional, long-term funding.	Pursuit of funding for Flexible Fleets is included in SANDAG's 2025 Legislative Program.

## Scoring Rubric Metrics for Other Modes of Existing Flexible Fleets

Projects will be scored based on the Applicant's responses to the Scoring Criteria below. The Scoring Rubric is a guide for SANDAG staff and the Evaluation Panel to assist with awarding points based on the Scoring Criteria. The Objective criteria (points calculated by SANDAG's Department of Data Science or Grants staff) are marked with an asterisk (\*).

### 5. PERFORMANCE

Up to 20 points possible

Applicants will receive points based on how well the existing service performed, measured by performance metrics. The following productivity metrics demonstrate the success of the program and the benefit of its continuation. Applicants will only be scored on the metric that is relevant to their service mode. The point rubrics were produced based on industry performance data and standards for each mode.

#### 5.1 Existing Microtransit and NEV Shuttle Services Program Metric: Trip Denial Rate\*

See Attachment 5.

#### 5.2 Existing Micromobility Services Program Metric: Average Rides Per Device Per Day (Device Utilization)\*

The number of total trips divided by the reported number of devices. This should be calculated as the daily average over any 6-month period within the operations window.

Applicant Response	Points
2.5 rides per device per day	20 points
2.0 rides per device per day	16 points
1.5 rides per device per day	12 points
1.0 rides per device per day	8 points
0.5 rides per device per day	4 points
0 rides per device per day	0 points

#### 5.3 Existing Carshare Services Program Metric: Average Vehicle Utilization\*

The average time each operational vehicle is in use daily. This is calculated as the daily average over a 6-month period within the operations window.

Applicant Response	Points
--------------------	--------

12.01% or greater	20 points
9.01%-12%	16 points
6.01%-9%	12 points
3.01%-6%	8 points
0.01%-3%	4 points
0%	0 points

#### 5.4 Existing Rideshare/Ridehail Services Program Metric: Pooled Trips\*

Percentage of daily pooled/shared trips divided by total trips. This should be calculated as the daily average over a 6-month period within the operations window.

Applicant Response	Points
24.01% or greater	20 points
18.01%-24%	16 points
12.01%-18%	12 points
6.01%-12%	8 points
0.01%-6%	4 points
0%	0 points





# Flexible Fleets Grant Program

## Draft Final Call for Projects

Transportation Committee | Item 4  
Jenny Russo, Grants Program Manager  
Emily Doss, Associate Regional Planner  
June 6, 2025

### Today's Agenda

- Funding and Eligibility
- Feedback and Revisions
- Evaluation Criteria
- Performance Metrics
- Anticipated Timeline

## Funding and Draft Final Eligibility

<b>Funding</b>	\$4.5 Million - FHWA Surface Transportation Block Grant Funds
<b>Eligible Applicants</b>	<ul style="list-style-type: none"> <li>• Local, state, federal &amp; tribal governmental agencies</li> <li>• Transit districts</li> <li>• Military institutions</li> </ul>
<b>Eligible Grant Types</b>	<ul style="list-style-type: none"> <li>• Service Operations</li> <li>• Capital (e.g. vehicles, software, supportive infrastructure)</li> </ul>
<b>Sample Eligible Activities</b>	<ul style="list-style-type: none"> <li>• Direct operations of service (Microtransit, NEV, etc.)</li> <li>• Contract services (Microtransit, NEV, Bikeshare, Carshare, etc.)</li> <li>• Vehicle Procurement</li> <li>• Software/Hardware</li> <li>• Flexible Fleet Supportive Infrastructure (e.g. charging, docking stations, right of way improvements, signage and wayfinding)</li> </ul>

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## Feedback & Revisions to Draft Final Call for Projects

- Existing services are eligible for funding up to \$500,000
- New services remain eligible for funding up to \$1,000,000
- Separate Scoring Criteria for New vs. Existing Services
- Revised Scoring Criteria (Att. 3 & Att. 4)
  - **Connectivity** (No. 2)
  - **Engagement** (No. 3)
  - **Accessibility** (No. 4)
  - **New Performance** (No. 5)
  - **Matching Funds** (No. 6)
- Refined Program Performance Metrics (Att. 2)

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## Draft Final Evaluation Criteria

Project Type	New	Existing
Financial Sustainability	20%	20%
<b>Feasibility</b>	20%	N/A
<b>Performance</b>	N/A	20%
Connectivity	20%	20%
Accessibility	15%	15%
Engagement	15%	15%
Matching Funds	10%	10%

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## Performance Metrics Categories



**Productivity**



**Connectivity**



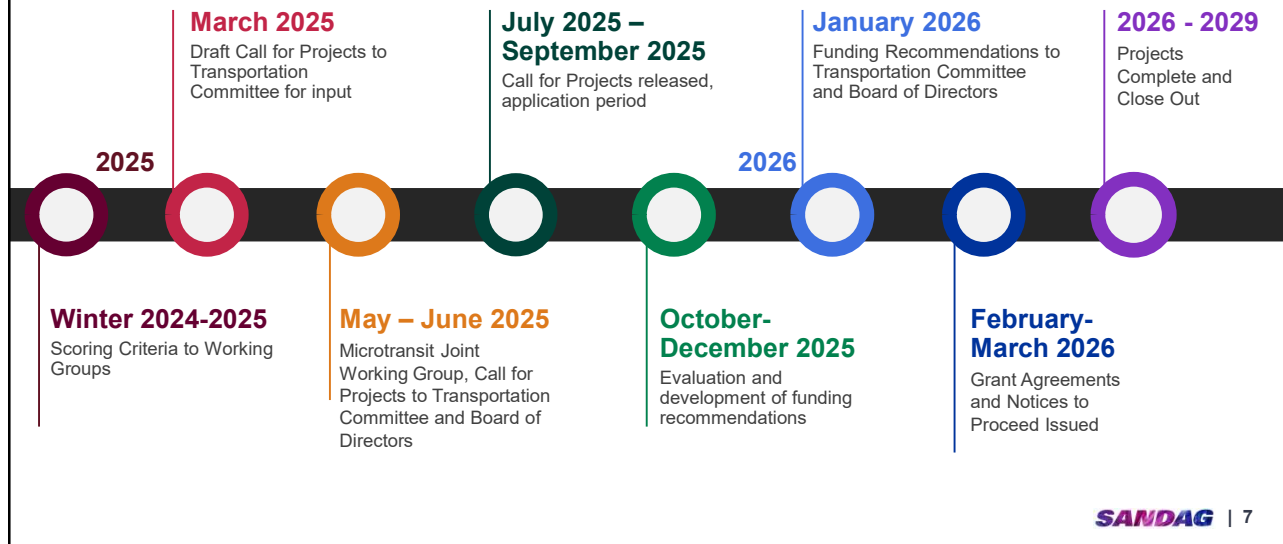
**Community  
Engagement &  
Accessibility**



**Cost  
Effectiveness**

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## Anticipated Timeline



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June 6, 2025

## Specialized Transportation Grant Program Cycle 13 Call for Projects Funding Recommendations

### Overview

Through a biennial competitive process, the SANDAG Specialized Transportation Grant Program (STGP) allocates both Federal Transit Administration Section 5310 (Section 5310) and TransNet Senior Mini-Grant (SMG) funding to support projects that improve mobility for older adults and individuals with disabilities throughout the region.

The Board of Directors approved the evaluation criteria and release of the Cycle 13 STGP Call for Projects on [June 28, 2024 \(Item 16\)](#). This report describes the evaluation process and the projects recommended to receive funding.

### Key Considerations

Attachment 1 provides an overview of the STGP Cycle 13 Call for Projects, including the evaluation process, the amount of available STGP funding, and the projects recommended for funding. Attachments 2 and 3 provide the detailed results, including the funding recommendations.

Based on the results, 37 projects from twelve nonprofit organizations and local agencies are collectively recommended to receive approximately \$9.5 million in STGP funding to provide specialized transportation services across the region. The recommended projects reflect broad geographic coverage of services, align with the funding priorities in the [2020 Coordinated Plan](#), and further the STGP goal and objectives. These projects include, but are not limited to, support for volunteer driver programs, information and referral services, and purchase of accessible vehicles. The SMG Cycle 13 funding recommendations were presented to the Independent Taxpayer Oversight Committee (ITOC) at its [May 14, 2025, meeting](#) for review and to ensure consistency with the TransNet Ordinance.

### Next Steps

Pending Board approval, the awarded STGP projects will be incorporated into the Regional Transportation Improvement Program, staff will begin executing grant agreements, and projects will commence no sooner than July 1, 2025. Three of the recommended Senior Mini-Grant projects continue existing specialized transportation services, and the grant agreements must be executed no later than July 1, 2025, to prevent a gap in services. The Board will be asked to approve retroactively issuing those agreements. Once the awarded STGP projects begin, they will be monitored and included in regular grant status reports provided to the Transportation Committee.

SANDAG anticipates that the next STGP Call for Projects will be released in June 2026.

### Action: Recommend

The Transportation Committee is asked to recommend that the Board of Directors approve the funding recommendations for the Specialized Transportation Grant Program Cycle 13 Call for Projects as detailed in the report.

### Fiscal Impact:

Pending Board of Directors approval, approximately \$9.5 million in Specialized Transportation Grant Program funding would be awarded to specialized transportation projects.

### Schedule/Scope Impact:

Awarded TransNet Senior Mini-Grant and Section 5310 projects would begin no sooner than July 1, 2025, and October 1, 2025, respectively. Non-vehicle projects are anticipated to be completed in one to two years from grant execution. Completion dates for vehicle projects are anticipated to be five to six years from the grant execution.

***Susan Huntington, Director of Financial Planning, Budgets, and Grants***

Attachments: 1. Discussion Memo  
2. Section 5310 Funding Recommendations  
3. SMG Funding Recommendations  
4. STGP Monitoring Checklist Template

# Discussion Memo

## Historical Context for STGP Cycle 13 Call for Projects

With input from the TransNet Independent Taxpayer Oversight Committee (ITOC), Transportation Committee (TC), and specialized transportation stakeholders and approval by the Board, SANDAG sets evaluation criteria from which proposed STGP projects are scored. Staff presented the STGP Cycle 13 Call for Projects (Cycle 13) to the ITOC at its [May 8, 2024, meeting](#) and to the TC on [May 17, 2024, meeting](#). The Board approved the Cycle 13 Evaluation Call for Projects at its [June 28, 2024, meeting](#). On July 10, 2024, SANDAG released the STGP Cycle 13 Call for Projects, making approximately \$9.3 million in STGP funding available.

SANDAG received funding requests from sixteen nonprofit organizations and local agencies requesting approximately \$12.44 million to support 57 projects. This is 31% more than the funding SANDAG had available. The oversubscription of applications illustrates the region's need for vital transportation services for these populations. SANDAG forecasts that the population aged 65 and older in the San Diego region will increase from about 519,000 people in 2022 to 763,000 people by 2050, a large demographic shift that foreshadows changing mobility needs. Based on these forecasts and funding needs, the SANDAG Board of Directors included specialized transportation in the SANDAG Legislative Program, and staff continue to look for sources of additional funding both in and outside of SANDAG's existing revenue sources that could be used to provide these services.

## Evaluation Process

Once the STGP Cycle 13 Call for Projects closed on October 9, 2024, SANDAG staff reviewed all proposed projects to determine if they met minimum eligibility requirements as outlined in the STGP Cycle 13 Call for Projects. Three submitted projects were deemed nonresponsive and ineligible. The remaining eligible projects were then scored by evaluators external to SANDAG with expertise in specialized transportation. They scored each application based on the qualitative evaluation criteria included in the Call for Projects, while SANDAG staff provided the quantitative scores based on the quantitative evaluation criteria.

Next, SANDAG staff applied a past performance-based adjustment to projects for which an applicant had held an STGP project during July 1, 2023, through June 30, 2024, as required by the Call for Projects. These dates coincide with SANDAG's fiscal year, the Specialized Transportation Grant Program monitoring schedule, and the Cycle 13 timeline. Applicants who have never held an STGP grant or applicants who did not have an STGP grant within the Past Performance Adjustment Review Period did not receive a Past Performance Adjustment (PPA). PPAs have been used in the STGP since 2012 and are intended to ensure grant funding is awarded to the highest performing applicants. The PPA encourages grantees to complete deliverables on time, report accurately, and be responsive to SANDAG inquiries so the grantee can be more competitive to receive a future grant to continue those services. Applicants who performed well in their prior grants receive additional points, and applicants who had performance issues receive negative points. The PPA is based on an assessment made of the grantee by the STGP Program Manager, using the STGP Monitoring Checklist Template (Attachment 4), and the results are reviewed and approved by the existing grantee.

The STGP Funding Recommendations were previously scheduled to be reviewed by the Transportation Committee on [May 16, 2025](#). However, SANDAG staff removed the item to analyze how the PPA was applied to confirm the results were accurate. This analysis revealed that some PPAs were incorrectly calculated due to the inclusion of older STGP grants where performance targets were not required. The SANDAG Data Science Department reviewed the updated results to ensure the results were accurate and that all scores were derived consistently with the Call for Projects. The additional analysis did not



change the SMG Funding Recommendations that were included in the May 16, 2025 Transportation Committee item, but it did change the Section 5310 Funding Recommendations. Three projects were added to the Section 5310 funding recommendations. One partial award was reduced, and another project was no longer recommended.

### **Section 5310 Federal Requirements**

The draft funding recommendations were reviewed to ensure federal funding requirements would be met. The Federal Transit Administration (FTA) requires that at least 55% of a region's apportionment be used toward traditional Section 5310 projects. Per [FTA Circular 9070.1G](#), traditional Section 5310 projects are defined as "public capital projects planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities when public transportation is insufficient, inappropriate, or unavailable." Traditional projects include, but are not limited to, purchase of Americans with Disabilities Act-compliant vehicles, purchase of support equipment related to Section 5310-funded vehicles, acquisition of transportation under a contract lease, and support for mobility management and coordination programs.

Staff reviewed the proposed Section 5310 projects, classifying them as traditional or nontraditional based on the federal requirements. Staff then calculated that the total cumulative grant request for traditional Section 5310 projects was \$5,610,506. As mentioned, the Section 5310 program mandates that at least 55% of the total apportionment be used toward traditional Section 5310 projects, or \$3,508,544.66, plus any previous cycle rollover traditional funds (\$258,696.46) for a total amount available of \$3,745,241.12 for traditional projects. Therefore, \$2,885,215.87 was available for nontraditional projects.

### **Section 5310 CTSA Sole Source Allocation**

One of the organizations recommended to receive funding, based on direction given by the Board of Directors at its [June 28, 2024, meeting](#), is Facilitating Access Coordinated Transportation (FACT). In 2006, SANDAG designated FACT as the Consolidated Transportation Services Agency (CTSA) for the region. In prior meetings, the Board and TC have indicated they would like to prioritize a sustainable funding source for the CTSA. On [June 28, 2024](#), the Board of Directors approved a 26% annual allocation of federal fiscal year 2023 and 2024 Section 5310 pass-through funding available to FACT for its CTSA and RideFACT services. After deducting SANDAG administration costs, a 26% allocation for FACT totaled \$1,658,584.75. On March 6, 2025, FACT sent its scope and budget proposals to SANDAG, which requested to use the sole source funding for both traditional and nontraditional projects (\$1,421,084 and \$237,500, respectively). This deduction was added to the funding results, and the traditional amount available for all competitive Section 5310 applicants became \$2,324,157.12, and the nontraditional amount available became \$2,647,715.87.

### **Section 5310 Funding Recommendations and Board Discretion**

Based on the project scores, 31 projects from ten nonprofit organizations and local agencies are collectively recommended to be awarded approximately \$6.6 million in Section 5310 funding, as shown in Attachment 2. Through these projects, 21 accessible vehicles and one fleet software will be purchased, volunteer driver programs will be supported, and travel training will be provided for older adults and individuals with disabilities.

As part of its approval of the Cycle 13 Call for Projects last June, the Board voted to retain discretion over the final Section 5310 awards, subject to FTA requirements. The Board can recommend projects to receive funding at its discretion, so long as traditional versus nontraditional funding regulations are followed, as discussed earlier.



## SMG Funding Recommendations

Based on the project scores, six projects from five nonprofit organizations are collectively recommended to be awarded approximately \$2.8 million in available SMG funding, as shown in Attachment 3. These projects will support specialized transportation services for older adults throughout the region. There was a \$79,897 increase in available SMG funding since the release of the Call for Projects, due to unspent Cycle 12 SMG funding and updated TransNet revenue forecasts for Fiscal Year 2025-2030, which were reviewed by the Board at its [February 14, 2025, meeting](#).

The TransNet Extension Ordinance requires SMG funds to be awarded through a competitive process. This means the Board cannot choose which Cycle 13 projects get funding unless it decides to cancel the current process and start a new one with different criteria.

## Anticipated Cycle 13 Timeline

The remaining activities and anticipated timeframe for completion are shown in the table below.

Activity	Anticipated Timeframe
Board consideration to approve funding recommendations	June 27, 2025
Regional Transportation Improvement Program amendment	July 2025
Federal Transit Administration Section 5310 application submittal	July 2025
STGP Cycle 13 Successful Applicant Webinar and Unsuccessful Applicant Debriefs	July 2025
SMG grant agreement execution	No earlier than July 1, 2025
Section 5310 grant agreement execution	No earlier than October 1, 2025
Section 5310 vehicle deliveries	Spring 2026

## Section 5310 Funding Recommendations

## Traditional Projects

Shortened Applicant Name	Shortened Project Name(s)	Shortened Project Type(s)	Traditional Type	Evaluator 2 Score	Evaluator 3 Score	Evaluator 4 Score	Average Qualitative Score	Past Performance Adjustment <sup>6</sup>	Quantitative Scores	Total Application Score	Grant Request	Recommended Grant Award	Notes
FACT	CTSA	MM	Traditional	Sole Source	Sole Source	Sole Source	Sole Source	Sole Source	Sole Source	Sole Source	\$ 1,041,084.00	\$ 1,041,084.00	1
FACT	RideFACT	CAP - Contracted Transportation	Traditional	Sole Source	Sole Source	Sole Source	Sole Source	Sole Source	Sole Source	Sole Source	\$ 380,000.00	\$ 380,000.00	1
TASSD	RIDEFinder 5310	MM	Traditional	88	90	87	88.33	5.00	10.00	103.33	\$ 200,000.00	\$ 200,000.00	
HCH	Fleet Management Software	CAP - Procurement	Traditional	88	89	88	88.33	3.00	10.00	101.33	\$ 128,640.00	\$ 128,640.00	
HGH	1 Class C Vehicle	CAP - Procurement	Traditional	88	89	88	88.33	3.00	8.00	99.33	\$ 137,354.00	\$ 137,354.00	
HGH	1 Class C Vehicle	CAP - Procurement	Traditional	88	89	88	88.33	3.00	8.00	99.33	\$ 137,354.00	\$ 137,354.00	
HGH	1 Class C Vehicle	CAP - Procurement	Traditional	88	89	88	88.33	3.00	8.00	99.33	\$ 137,354.00	\$ 137,354.00	
HGH	1 Class V Vehicle	CAP - Procurement	Traditional	88	89	88	88.33	3.00	8.00	99.33	\$ 81,906.00	\$ 81,906.00	
HGH	1 Class V Vehicle	CAP - Procurement	Traditional	88	89	88	88.33	3.00	8.00	99.33	\$ 81,906.00	\$ 81,906.00	
ArcSD	MCRD Contracted Transportation	CAP - Contracted Transportation	Traditional	81	85	77	81.00	3.50	14.00	98.50	\$ 544,464.00	\$ 544,464.00	
Noah Homes	1 Class Z-1 Vehicle	CAP - Procurement	Traditional	84	90	86	86.67	2.50	6.00	95.17	\$ 108,071.00	\$ 108,071.00	
Noah Homes	1 Class Z-1 Vehicle	CAP - Procurement	Traditional	84	90	86	86.67	2.50	6.00	95.17	\$ 108,071.00	\$ 108,071.00	
Noah Homes	1 Class Z-1 Vehicle	CAP - Procurement	Traditional	84	90	86	86.67	2.50	6.00	95.17	\$ 108,071.00	\$ 108,071.00	
Noah Homes	1 Class Z-1 Vehicle	CAP - Procurement	Traditional	84	90	86	86.67	2.50	6.00	95.17	\$ 108,071.00	\$ 108,071.00	
SMSC	1 Class C Vehicle	CAP - Procurement	Traditional	88	90	84	87.33	1.00	6.00	94.33	\$ 102,294.00	\$ 102,294.00	
SMSC	1 Class C Vehicle	CAP - Procurement	Traditional	88	90	84	87.33	1.00	6.00	94.33	\$ 102,294.00	\$ 102,294.00	
SMSC	1 Class V Vehicle	CAP - Procurement	Traditional	88	90	84	87.33	1.00	6.00	94.33	\$ 72,739.00	\$ 72,739.00	
SMSC	1 Class V Vehicle	CAP - Procurement	Traditional	88	90	84	87.33	1.00	6.00	94.33	\$ 72,739.00	\$ 72,739.00	
SPSS	1 Class V Vehicle	CAP - Procurement	Traditional	88	90	70	82.67	N/A	9.00	91.67	\$ 71,141.00	\$ 71,141.00	
SPSS	1 Class V Vehicle	CAP - Procurement	Traditional	88	90	70	82.67	N/A	9.00	91.67	\$ 71,141.00	\$ 21,688.12	2
SPSS	1 Class V Vehicle	CAP - Procurement	Traditional	88	90	70	82.67	N/A	9.00	91.67	\$ 71,141.00	\$ -	
SPSS	1 Class V Vehicle	CAP - Procurement	Traditional	88	90	70	82.67	N/A	9.00	91.67	\$ 71,141.00	\$ -	
SPSS	1 Class V Vehicle	CAP - Procurement	Traditional	88	90	70	82.67	N/A	9.00	91.67	\$ 71,141.00	\$ -	
SPSS	1 Class V Vehicle	CAP - Procurement	Traditional	88	90	70	82.67	N/A	9.00	91.67	\$ 71,141.00	\$ -	
SPSS	1 Class V Vehicle	CAP - Procurement	Traditional	88	90	70	82.67	N/A	9.00	91.67	\$ 71,141.00	\$ -	
SPSS	1 Class V Vehicle	CAP - Procurement	Traditional	88	90	70	82.67	N/A	9.00	91.67	\$ 71,141.00	\$ -	
SPSS	1 Class V Vehicle	CAP - Procurement	Traditional	88	90	70	82.67	N/A	9.00	91.67	\$ 71,141.00	\$ -	
SPSS	1 Class V Vehicle	CAP - Procurement	Traditional	88	90	70	82.67	N/A	9.00	91.67	\$ 71,141.00	\$ -	
SPSS	1 Class V Vehicle	CAP - Procurement	Traditional	88	90	70	82.67	N/A	9.00	91.67	\$ 71,141.00	\$ -	
Sharp	1 Class C Vehicle	CAP - Procurement	Traditional	83	90	83	85.33	-3.00	8.00	90.33	\$ 114,818.00	\$ -	
Sharp	1 Class C Vehicle	CAP - Procurement	Traditional	83	90	83	85.33	-3.00	8.00	90.33	\$ 114,818.00	\$ -	
Tri-City	1 Class B Vehicle	CAP - Procurement	Traditional	81	90	76	82.33	N/A	8.00	90.33	\$ 112,921.00	\$ -	
Tri-City	1 Class B Vehicle	CAP - Procurement	Traditional	81	90	76	82.33	N/A	8.00	90.33	\$ 112,921.00	\$ -	
Tri-City	1 Class D Vehicle	CAP - Procurement	Traditional	81	90	76	82.33	N/A	8.00	90.33	\$ 87,831.00	\$ -	
Non-Responsive Applicant	Non-Responsive Project	MM	Traditional	0	0	0	0.00	0.00	0.00	0.00	\$ 244,103.00	\$ -	
Non-Responsive Applicant	Non-Responsive Project	CAP - Procurement	Traditional	0	0	0	0.00	0.00	0.00	0.00	\$ 459,272.00	\$ -	
Traditional Subtotal											\$ 5,610,506.00	\$ 3,745,241.12	

## Section 5310 Funding Recommendations

### Nontraditional Projects

Shortened Applicant Name	Shortened Project Name	Shortened Project Type	Traditional Type	Evaluator 2 Score	Evaluator 3 Score	Evaluator 4 Score	Average Qualitative Score	Past Performance Adjustment <sup>6</sup>	Quantitative Scores	Total Application Score	Grant Request	Recommended Grant Award	Notes
FACT	RideFACT	OP	Nontraditional	Sole Source	Sole Source	Sole Source	Sole Source	Sole Source	Sole Source	Sole Source	\$ 237,500.00	\$ 237,500.00	3
JFS	OTG 5310	OP	Nontraditional	83	84	81	82.67	5.00	14.00	101.67	\$ 1,150,000.00	\$ 1,150,000.00	
TASSD	Senior Solutions 5310	OP	Nontraditional	83	84	81	82.67	5.00	14.00	101.67	\$ 200,000.00	\$ 200,000.00	
SMSC	Mileage Reimbursement	OP	Nontraditional	81	84	80	81.67	5.00	15.00	101.67	\$ 388,000.00	\$ 388,000.00	
Tri-City	Patient Transport	OP	Nontraditional	72	84	74	76.67	N/A	12.00	88.67	\$ 60,855.00	\$ 60,855.00	
MTS	1 Class B Vehicle	CAP - Procurement	Nontraditional	75	90	79	81.33	-3.00	8.00	86.33	\$ 157,903.00	\$ 157,903.00	
MTS	1 Class B Vehicle	CAP - Procurement	Nontraditional	75	90	79	81.33	-3.00	8.00	86.33	\$ 157,903.00	\$ 157,903.00	
MTS	1 Class B Vehicle	CAP - Procurement	Nontraditional	75	90	79	81.33	-3.00	8.00	86.33	\$ 157,903.00	\$ 157,903.00	
MTS	1 Class B Vehicle	CAP - Procurement	Nontraditional	75	90	79	81.33	-3.00	8.00	86.33	\$ 157,903.00	\$ 157,903.00	
MTS	1 Class B Vehicle	CAP - Procurement	Nontraditional	75	90	79	81.33	-3.00	8.00	86.33	\$ 157,903.00	\$ 157,903.00	
MTS	1 Class B Vehicle	CAP - Procurement	Nontraditional	75	90	79	81.33	-3.00	8.00	86.33	\$ 157,903.00	\$ 59,345.86	2
MTS	1 Class B Vehicle	CAP - Procurement	Nontraditional	75	90	79	81.33	-3.00	8.00	86.33	\$ 157,903.00	\$ -	
MTS	1 Class B Vehicle	CAP - Procurement	Nontraditional	75	90	79	81.33	-3.00	8.00	86.33	\$ 94,678.00	\$ -	
<b>Nontraditional Subtotal</b>											<b>\$ 3,236,354.00</b>	<b>\$ 2,885,215.87</b>	
<b>Grand Section 5310 Total</b>											<b>\$ 8,846,860.00</b>	<b>\$ 6,630,456.98</b>	

Section 5310 Funding Source	Award Amount Available
FFY 2023-24 Cycle 13 Apportionment Traditional Funds (55%)	\$ 3,508,544.66
FFY 2023-24 Cycle 13 Apportionment Nontraditional Funds (45%)	\$ 2,870,627.45
Total FFY 2023-24 Cycle 13 Apportionment <sup>4</sup>	\$ 6,379,172.10
FACT Sole Source (26% of FFY 2023-24 Cycle 13 Apportionment)	\$ 1,658,584.75
Remaining FFY 2023-24 Cycle 13 Apportionment Competitive Funds	\$ 4,720,587.35
Previous Cycle Rollover Traditional Funds	\$ 236,696.46
Previous Cycle Rollover Nontraditional	\$ 14,588.42
Total Traditional Funds	\$ 3,745,241.12
Total Nontraditional Funds	\$ 2,885,215.87
Grand Total Funds Available <sup>5</sup>	\$ 6,630,456.98

Recommended for full funding
Recommended for partial funding
Not recommended for funding

#### Notes

- On June 28, 2024 under Item No. 16, the SANDAG Board approved a 26% annual allocation of Federal Fiscal Year 2023 and 2024 Section 5310 pass-through funding available to Facilitating Access to Coordinated Transportation (FACT) for RideFACT service and mobility management. These two activities are considered traditional Partial vehicle award
- 
- On June 28, 2024 under Item No. 16, the SANDAG Board approved a 26% annual allocation of Federal Fiscal Year 2023 and 2024 Section 5310 pass-through funding available to Facilitating Access to Coordinated Transportation (FACT) for RideFACT service and mobility management. RideFACT activity is considered a nontraditional Section 5310 project if under the operating project type.
- FFY 2023-24 Cycle 13 Apportionment total subtracts 10% for SANDAG administrative costs. The FTA requires 55% of the Section 5310 apportionment to be used for traditional projects.
- All funding totals are actuals as of 4/9/25.
- Applicants who have never held an STGP grant or applicants who have not held an STGP grant within the Past Performance Adjustment Review Period did not receive a Past Performance Adjustment.

**SANDAG Specialized Transportation Grant Program**  
**Cycle 13 Call for Projects: Section 5310 Program**

Line #	Application ID	Applicant Name	Shortened Applicant Name	Project Name	Shortened Project Name	Project Type	Shortened Project Type	Project Description	Grant Request	Proposed Matching Funds	Traditional or Nontraditional
1	C13-5310-1	Tri-City Hospital Foundation	Tri-City	Patient Transportation Express Grant	Patient Transport	Operating	OP	To provide curb-to-curb non-emergency medical transportation in the North San Diego area to individuals who can't access the buses due to the severity of their disabilities.	\$60,855	\$60,855	Nontraditional
2	C13-5310-2	Tri-City Hospital Foundation	Tri-City	Patient Transport Express Grant	2 Class B Vehicles and 1 Class D Vehicle	Capital - Vehicle and Other Equipment Procurement	CAP - Procurement	2 Class B Vehicles, 1 Class D Vehicles to provide curb-to-curb non-emergency medical transportation in the North San Diego area to individuals who can't access the buses due to the severity of their disabilities.	\$313,675	\$33,877	Traditional
3	C13-5310-3	Noah Homes	Noah Homes	Noah Homes Electric Vehicle Equipment Procurement Program	4 Class Z-1 Vehicles	Capital - Vehicle and Other Equipment Procurement	CAP - Procurement	4 Class Z-1 Vehicles for client transportation	\$432,284	\$150,000	Traditional
4	C13-5310-4	Sharp HealthCare Foundation	Sharp	Sharp Transportation Program	2 Class C Vehicles	Capital - Vehicle and Other Equipment Procurement	CAP - Procurement	2 Class C vehicles for client transportation	\$229,636	\$40,524	Traditional
5	C13-5310-5	The Arc of San Diego	ArcSD	MCRD Contracted Transportation Program	MCRD Contracted Transportation	Capital - Contracted Transportation Service	CAP - Contracted Transportation	Maintains existing door-to-door services, particularly during early morning hours when public transportation is unavailable. It connects Arc clients to specialized transportation via contracted vehicles that cater to their unique schedules and needs.	\$544,464	\$136,116	Traditional
6	C13-5310-6	San Diego Metropolitan Transit System	MTS	FY25 ADA Bus Procurement	8 Class B Vehicles	Capital - Vehicle and Other Equipment Procurement	CAP - Procurement	8 Class B vehicles for paratransit service	\$1,200,000	\$379,032	Nontraditional
7	C13-5310-7	Jewish Family Service of San Diego	JFS	On the Go 5310	OTG 5310	Operating	OP	Continue serving senior residents and senior service organizations of Greater San Diego utilizing Rides & Smiles volunteer donation based driving program, OTG Navigator sliding scale fee based for urgent requests, meal delivery, and OTG fee based Shuttles. The program may expand/adjust service boundaries within the proposed zip codes. OTG staff drivers and Transportation Network Companies will provide back up for Rides & Smiles rides not selected by a volunteer. Provide rides to/from appointments and activities up to 25 miles of the rider's residence or centralized pick up point. Offer personalized assistance required by seniors suffering from physical and mental disabilities, including assistance getting in and out of vehicle or utilizing vehicle lift system.¶	\$1,150,000	\$1,150,000	Nontraditional
8	C13-5310-8	Travelers Aid Society of San Diego	TASSD	RIDEFinder 5310	RIDEFinder 5310	Mobility Management	MM	Improve access to existing transportation services within the large urbanized area of SD County to low income older adults, ages 65 and over and persons with disabilities of any age. This will be accomplished through coordination efforts with agency partners, information & referral services, matching transportation needs of our clients to available resources, and by providing training to allow individuals to better utilize public transportation where appropriate.	\$200,000	\$50,000	Traditional

**SANDAG Specialized Transportation Grant Program**  
**Cycle 13 Call for Projects: Section 5310 Program**

9	C13-5310-9	Travelers Aid Society of San Diego	TASSD	Senior Solutions 5310	Senior Solutions 5310	Operating	OP	Fill transportation gaps for low-income seniors ages 65+ and individuals with disabilities of any age who are immunocompromised, and need safe travel options for doctor visits, dialysis appointments, cancer treatments, and shopping trips. The program provides free 1:1 trip options to enrolled clients, including door-to-door & door-through-door services utilizing volunteer drivers, rides with partner agency door-to-door services, and ride share services.	\$200,000	\$200,000	Nontraditional
10	C13-5310-10	Home of Guiding Hands	HGH	HGH Community Integration and Mobilization Transportation Program	3 Class C vehicles and 2 Class V vehicles and fleet management software	Capital - Vehicle and Other Equipment Procurement	CAP - Procurement	3 Class C vehicles and 2 Class V vehicles as well as fleet management software for client transportation	\$704,514	\$133,787	Traditional
11	C13-5310-11	St. Paul's Episcopal Home, Inc.	SPSS	St. Paul's Transportation Services	10 Class V Vehicles	Capital - Vehicle and Other Equipment Procurement	CAP - Procurement	10 Class V vehicles for client transportation	\$711,410	\$125,550	Traditional
12	C13-5310-12	St. Madeleine Sophie's Center	SMSC	Mileage Reimbursement	Mileage Reimbursement	Operating	OP	Operating support through mileage reimbursement funds. This project will serve over 400 individuals with intellectual and developmental disabilities enrolled at SMSC annually. These individuals use our fleet of vehicles on a daily basis for trips to and from vocational training, work sites, and community activities throughout San Diego County.	\$388,000	\$388,000	Nontraditional
13	C13-5310-13	St. Madeleine Sophie's Center	SMSC	Vehicle Procurement	2 Class C Vehicles and 2 Class V Vehicles	Capital - Vehicle and Other Equipment Procurement	CAP - Procurement	2 Class C vehicles and 2 Class V vehicles for client transportation	\$350,066	\$61,780	Traditional
14	C13-5310-14	Facilitating Access to Coordinated Transportation	FACT	CTSA	CTSA Services	Mobility Management	MM	Sole source to enhanced mobility management services to the region that improves coordination among specialized transportation providers, resulting in an increase in the number of trips provided to seniors and individuals with disabilities over the grant term. This will be accomplished through additional telephone referral services, brokerage management, accessible vehicle sharing, technical assistance, regional coordination, outreach and marketing, and research besides those services provided under the Consolidated Transportation Service Agency contract with SANDAG.	\$1,041,084	\$832,146	Traditional
15	C13-5310-15	Facilitating Access to Coordinated Transportation	FACT	RideFACT	RideFACT	Capital - Contracted Transportation Service	CAP - Contracted Transportation	Sole source to provide specialized dial-a-ride service designed to provide wheelchair accessible transportation to seniors and persons with disabilities who lack other available transit options.	\$380,000	\$95,000	Traditional
16	C13-5310-16	Facilitating Access to Coordinated Transportation	FACT	RideFACT	RideFACT	Operating	OP	Sole source to provide specialized dial-a-ride service designed to provide wheelchair accessible transportation to seniors and persons with disabilities who lack other available transit options.	\$237,500	\$237,500	Nontraditional

## Section 5310 Evaluator 2 Score Sheet

### Evaluator Instructions:

**Step 1:** Review the STGP Cycle 13 Evaluation Criteria and Scoring Rubric included in your Evaluator Packet.

**Step 2:** Score each project application's qualitative responses using the Evaluation Criteria and Scoring Rubric. While most qualitative responses can be found in the Project Narrative section of the Project Application, others can be found in the Project Scope of Work and other application materials. SANDAG scores the quantitative responses against the quantitative evaluation criteria, which vary based on project type. To score the qualitative responses, enter an integer not greater than the maximum number of points allowed for the qualitative response you are scoring. The scoring cells contain formulas that will not allow you to enter a number greater than the maximum points allowed for the qualitative criteria you are scoring; neither will they allow you to enter half-points. Do not enter a zero unless a response to a criterion is missing or is so incomplete or incoherent that you cannot reasonably understand or infer the meaning of the response. The Total Score will autopopulate.

**Step 2a:** For **Capital - Contracted Transportation Service and Operating Projects**, provide scores for Evaluation Criteria 1 through 8, except 2A, 7A, and 7B; SANDAG scores these criteria.

**Step 2b:** For **Mobility Management Projects**, provide scores for Evaluation Criteria 1 through 8, except 2A and 7A; SANDAG scores these criteria.

**Step 2c:** For **Capital - Vehicle and Other Equipment Procurement Projects**, provide scores for Evaluation Criteria 1 through 8, except 2A and 7A; SANDAG scores these criteria.

### Step 2: Score Project Applications

#### Step 2a: Score Capital - Contracted Transportation Service and Operating Projects

Shortened Applicant Name	Shortened Project Name	Evaluation Criteria																		Total Evaluator Score
		1			2			3		4			5		6	8				
		A.	B.	C.	B.	C.	D.	A.	B.	A.	B.	C.	A.	B.	A.	A.	B.	C.		
		Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points		
Tri-City	Patient Transportation	3	3	3	5	5	5	4	5	5	5	5	5	5	3	5	2	4	72	
JFS	On the Go	5	5	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5	83	
TASD	Senior Solutions	5	5	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5	83	
SMSC	Mileage Reimbursement	5	3	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5	81	
ArcSD	MCRD Contracted Transportation	5	3	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5	81	

#### Step 2b: Score Mobility Management Projects

Shortened Applicant Name	Shortened Project Name	Evaluation Criteria																	Total Evaluator Score
		1			2			3	4			5		6	7	8			
		A.	B.	C.	B.	C.	D.	A.	A.	B.	C.	A.	B.	A.	B.	A.	B.	C.	
		Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to <u>10</u> points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	
TASD	RIDEfinder	5	5	5	5	5	5	10	5	5	5	5	5	3	5	5	5	5	88

## Section 5310 Evaluator 2 Score Sheet

### Step 2c: Score Vehicle and Other Equipment Procurement Projects

Shortened Applicant Name	Shortened Project Name	Evaluation Criteria																		Total Evaluator Score
		1			2			3		4			5		6	7	8			
		A.	B.	C.	B.	C.	D.	A.	B.	A.	B.	C.	A.	B.	A.	B.	A.	B.	C.	
		Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	
Tri-City	2 Class B Vehicles and 1 Class D Vehicle	4	4	4	5	5	5	5	5	5	5	5	5	5	3	5	5	2	4	81
Noah Homes	4 Class Z-1 Vehicles	4	4	4	5	4	5	5	5	5	5	5	3	5	5	5	5	5	5	84
Sharp	2 Class C Vehicles	5	5	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5	5	88
MTS	8 Class B Vehicles	5	5	5	3	3	5	3	5	3	4	5	3	4	3	4	5	5	5	75
HGH	3 Class C Vehicles and 2 Class V Vehicles with Fleet Software	5	5	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5	5	88
SPSS	10 Class V Vehicles	5	5	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5	5	88
SMSC	2 Class C Vehicles and 2 Class V Vehicles	5	5	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5	5	88

## Section 5310 Evaluator 3 Score Sheet

### Evaluator Instructions:

**Step 1:** Review the STGP Cycle 13 Evaluation Criteria and Scoring Rubric included in your Evaluator Packet.

**Step 2:** Score each project application's qualitative responses using the Evaluation Criteria and Scoring Rubric. While most qualitative responses can be found in the Project Narrative section of the Project Application, others can be found in the Project Scope of Work and other application materials. SANDAG scores the quantitative responses against the quantitative evaluation criteria, which vary based on project type. To score the qualitative responses, enter an integer not greater than the maximum number of points allowed for the qualitative response you are scoring. The scoring cells contain formulas that will not allow you to enter a number greater than the maximum points allowed for the qualitative criteria you are scoring; neither will they allow you to enter half-points. Do not enter a zero unless a response to a criterion is missing or is so incomplete or incoherent that you cannot reasonably understand or infer the meaning of the response. The Total Score will auto populate.

**Step 2a:** For **Capital - Contracted Transportation Service and Operating Projects**, provide scores for Evaluation Criteria 1 through 8, except 2A, 7A, and 7B; SANDAG scores these criteria.

**Step 2b:** For **Mobility Management Projects**, provide scores for Evaluation Criteria 1 through 8, except 2A and 7A; SANDAG scores these criteria.

**Step 2c:** For **Capital - Vehicle and Other Equipment Procurement Projects**, provide scores for Evaluation Criteria 1 through 8, except 2A and 7A; SANDAG scores these criteria.

### Step 2: Score Project Applications

#### Step 2a: Score Capital - Contracted Transportation Service and Operating Projects

Shortened Applicant Name	Shortened Project Name	Evaluation Criteria															Total Evaluator Score		
		1			2			3		4			5		6	8			
		A.	B.	C.	B.	C.	D.	A.	B.	A.	B.	C.	A.	B.	A.	A.		B.	C.
		Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points		Up to 5 points	Up to 5 points
Tri-City	Patient Transportation	5	5	5	5	5	5	5	5	5	5	5	5	5	4	5	5	5	84
JFS	On the Go	5	5	5	5	5	5	5	5	5	5	5	4	5	5	5	5	5	84
TASD	Senior Solutions	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	4	84
SMSC	Mileage Reimbursement	5	5	5	5	5	5	5	5	5	5	5	4	5	5	5	5	5	84
ArcSD	MCRD Contracted Transportation	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	85

#### Step 2b: Score Mobility Management Projects

Shortened Applicant Name	Shortened Project Name	Evaluation Criteria															Total Evaluator Score		
		1			2			3	4			5		6	7	8			
		A.	B.	C.	B.	C.	D.	A.	A.	B.	C.	A.	B.	A.	B.	A.		B.	C.
		Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 10 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points		Up to 5 points	Up to 5 points
TASD	RIDEfinder	5	5	5	5	5	5	10	5	5	5	5	5	5	5	5	5	5	90



## Section 5310 Evaluator 3 Score Sheet

### Step 2c: Score Vehicle and Other Equipment Procurement Projects

Shortened Applicant Name	Shortened Project Name	Evaluation Criteria																		Total Evaluator Score
		1			2			3		4			5		6	7	8			
		A.	B.	C.	B.	C.	D.	A.	B.	A.	B.	C.	A.	B.	A.	B.	A.	B.	C.	
		Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	Up to 5 points	
Tri-City	2 Class B Vehicles and 1 Class D Vehicle	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	90
Noah Homes	4 Class Z-1 Vehicles	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	90
Sharp	2 Class C Vehicles	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	90
MTS	8 Class B Vehicles	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	90
HGH	3 Class C Vehicles and 2 Class V Vehicles with Fleet Software	5	5	5	5	5	5	5	5	5	4	5	5	5	5	5	5	5	5	89
SPSS	10 Class V Vehicles	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	90
SMSC	2 Class C Vehicles and 2 Class V Vehicles	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	90

## Section 5310 Evaluator 4 Score Sheet

### Evaluator Instructions:

**Step 1:** Review the STGP Cycle 13 Evaluation Criteria and Scoring Rubric included in your Evaluator Packet.

**Step 2:** Score each project application's qualitative responses using the Evaluation Criteria and Scoring Rubric. While most qualitative responses can be found in the Project Narrative section of the Project Application, others can be found in the Project Scope of Work and other application materials. SANDAG scores the quantitative responses against the quantitative evaluation criteria, which vary based on project type. To score the qualitative responses, enter an integer not greater than the maximum number of points allowed for the qualitative response you are scoring. The scoring cells contain formulas that will not allow you to enter a number greater than the maximum points allowed for the qualitative criteria you are scoring; neither will they allow you to enter half-points. Do not enter a zero unless a response to a criterion is missing or is so incomplete or incoherent that you cannot reasonably understand or infer the meaning of the response. The Total Score will autopopulate.

**Step 2a:** For **Capital - Contracted Transportation Service and Operating Projects**, provide scores for Evaluation Criteria 1 through 8, except 2A, 7A, and 7B; SANDAG scores these criteria.

**Step 2b:** For **Mobility Management Projects**, provide scores for Evaluation Criteria 1 through 8, except 2A and 7A; SANDAG scores these criteria.

**Step 2c:** For **Capital - Vehicle and Other Equipment Procurement Projects**, provide scores for Evaluation Criteria 1 through 8, except 2A and 7A; SANDAG scores these criteria.

### Step 2: Score Project Applications

#### Step 2a: Score Capital - Contracted Transportation Service and Operating Projects

Shortened Applicant Name	Shortened Project Name	Evaluation Criteria																		Total Evaluator Score
		1			2			3		4			5		6		8			
		A.	B.	C.	B.	C.	D.	A.	B.	A.	B.	C.	A.	B.	A.		A.	B.	C.	
		Up to 5 points	5 points	5 points	5 points	5 points	5 points	5 points	5 points	5 points	5 points	5 points	5 points	5 points	5 points	Up to 5 points		5 points	5 points	
Tri-City	Patient Transportation	4	4	5	5	4	4	5	3	5	5	5	5	5	3	4	5	3	74	
JFS	On the Go	5	5	5	5	5	5	5	5	5	5	3	5	5	5	5	5	3	81	
TASD	Senior Solutions	5	5	5	5	5	5	5	3	5	5	5	5	5	5	3	5	5	81	
SMSC	Mileage Reimbursement	5	5	5	5	5	5	5	5	5	5	5	5	5	3	5	3	4	80	
ArcSD	MCRD Contracted Transportation	3	3	5	5	5	5	5	4	5	5	5	5	5	3	5	5	4	77	

#### Step 2b: Score Mobility Management Projects

Shortened Applicant Name	Shortened Project Name	Evaluation Criteria																		Total Evaluator Score
		1			2			3	4			5		6	7	8				
		A.	B.	C.	B.	C.	D.	A.	A.	B.	C.	A.	B.	A.	B.	A.	B.	C.		
		Up to 5 points	5 points	5 points	5 points	5 points	5 points	10 points	5 points	5 points	5 points	5 points	5 points	5 points	Up to 5 points	5 points	5 points	5 points		
TASD	RIDEfinder	5	5	5	5	5	5	10	5	5	3	5	5	5	5	5	5	4	87	

## Section 5310 Evaluator 4 Score Sheet

### Step 2c: Score Vehicle and Other Equipment Procurement Projects

Shortened Applicant Name	Shortened Project Name	Evaluation Criteria																		Total Evaluator Score
		1			2			3		4			5		6	7	8			
		A.	B.	C.	B.	C.	D.	A.	B.	A.	B.	C.	A.	B.	A.	B.	A.	B.	C.	
		Up to 5 points	5 points	5 points	5 points	5 points	5 points	5 points	5 points	5 points	5 points	5 points	5 points	5 points	5 points	5 points	5 points	5 points	5 points	
Tri-City	2 Class B Vehicles and 1 Class D Vehicle	4	4	5	4	4	4	5	1	5	5	5	5	5	3	5	4	5	3	76
Noah Homes	4 Class Z-1 Vehicles	4	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	4	3	86
Sharp	2 Class C Vehicles	5	5	5	5	4	5	5	5	5	5	3	4	5	3	5	5	5	4	83
MTS	8 Class B Vehicles	5	5	5	5	5	3	2	4	5	5	5	5	5	5	5	3	4	3	79
HGH	3 Class C Vehicles and 2 Class V Vehicles with Fleet Software	5	5	5	5	5	5	5	5	5	5	5	5	5	4	5	5	5	4	88
SPSS	10 Class V Vehicles	5	5	1	2	4	3	2	3	5	5	4	3	5	5	5	5	5	3	70
SMSC	2 Class C Vehicles and 2 Class V Vehicles	5	5	5	5	5	5	4	5	5	5	5	5	5	3	5	5	3	4	84

## Section 5310 Evaluator Scores

### Capital - Contracted Transportation Service and Operating Projects

Evaluator Number	Shortened Applicant Name	Shortened Project Name	1A	1B	1C	2B	2C	2D	3A	3B	4A	4B	4C	5A	5B	6A	8A	8B	8C	Total Evaluator Score
2	Tri-City	Patient Transportation	3	3	3	5	5	5	4	5	5	5	5	5	5	3	5	2	4	72
3	Tri-City	Patient Transportation	5	5	5	5	5	5	5	5	5	5	5	5	5	5	4	5	5	84
4	Tri-City	Patient Transportation	4	4	5	5	4	4	5	3	5	5	5	5	5	3	4	5	3	74
2	JFS	On the Go	5	5	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5	83
3	JFS	On the Go	5	5	5	5	5	5	5	5	5	5	4	5	5	5	5	5	5	84
4	JFS	On the Go	5	5	5	5	5	5	5	5	5	5	3	5	5	5	5	5	3	81
2	TASD	Senior Solutions	5	5	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5	83
3	TASD	Senior Solutions	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	4	84
4	TASD	Senior Solutions	5	5	5	5	5	5	5	3	5	5	5	5	5	5	3	5	5	81
2	SMSC	Mileage Reimbursement	5	3	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5	81
3	SMSC	Mileage Reimbursement	5	5	5	5	5	5	5	5	5	5	5	4	5	5	5	5	5	84
4	SMSC	Mileage Reimbursement	5	5	5	5	5	5	5	5	5	5	5	5	5	3	5	3	4	80
2	ArcSD	MCRD Contracted Transportation	5	3	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5	81
3	ArcSD	MCRD Contracted Transportation	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	85
4	ArcSD	MCRD Contracted Transportation	3	3	5	5	5	5	5	4	5	5	5	5	5	3	5	5	4	77

### Mobility Management Projects

Evaluator Number	Shortened Applicant Name	Shortened Project Name	1A	1B	1C	2B	2C	2D	3A	4A	4B	4C	5A	5B	6A	7B	8A	8B	8C	Total Evaluator Score
2	TASD	RIDEFinder	5	5	5	5	5	5	10	5	5	5	5	5	3	5	5	5	5	88
3	TASD	RIDEFinder	5	5	5	5	5	5	10	5	5	5	5	5	5	5	5	5	5	90
4	TASD	RIDEFinder	5	5	5	5	5	5	10	5	5	3	5	5	5	5	5	5	4	87

### Vehicle and Other Equipment Procurement Projects

Evaluator Number	Shortened Applicant Name	Shortened Project Name	1A	1B	1C	2B	2C	2D	3A	3B	4A	4B	4C	5A	5B	6A	7B	8A	8B	8C	Total Evaluator Score
2	Tri-City	2 Class B Vehicles and 1 Class D Vehicle	4	4	4	5	5	5	5	5	5	5	5	5	5	3	5	5	2	4	81
3	Tri-City	2 Class B Vehicles and 1 Class D Vehicle	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	90
4	Tri-City	2 Class B Vehicles and 1 Class D Vehicle	4	4	5	4	4	4	5	1	5	5	5	5	5	3	5	4	5	3	76
2	Noah Homes	4 Class Z-1 Vehicles	4	4	4	5	4	5	5	5	5	5	5	3	5	5	5	5	5	5	84
3	Noah Homes	4 Class Z-1 Vehicles	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	90
4	Noah Homes	4 Class Z-1 Vehicles	4	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	4	3	86
2	Sharp	2 Class C Vehicles	5	5	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5	5	83
3	Sharp	2 Class C Vehicles	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	90
4	Sharp	2 Class C Vehicles	5	5	5	5	4	5	5	5	5	5	3	4	5	3	5	5	5	4	83
2	MTS	8 Class B Vehicles	5	5	5	3	3	5	3	5	3	4	5	3	4	3	4	5	5	5	75
3	MTS	8 Class B Vehicles	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	90
4	MTS	8 Class B Vehicles	5	5	5	5	5	3	2	4	5	5	5	5	5	5	5	3	4	3	79
2	HGH	3 Class C Vehicles and 2 Class V Vehicles with Fleet Software	5	5	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5	5	88
3	HGH	3 Class C Vehicles and 2 Class V Vehicles with Fleet Software	5	5	5	5	5	5	5	5	5	4	5	5	5	5	5	5	5	5	89
4	HGH	3 Class C Vehicles and 2 Class V Vehicles with Fleet Software	5	5	5	5	5	5	5	5	5	5	5	5	5	4	5	5	5	4	88
2	SPSS	10 Class V Vehicles	5	5	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5	5	88
3	SPSS	10 Class V Vehicles	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	90
4	SPSS	10 Class V Vehicles	5	5	1	2	4	3	2	3	5	4	3	5	5	5	5	5	5	3	70
2	SMSC	2 Class C Vehicles and 2 Class V Vehicles	5	5	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5	5	88
3	SMSC	2 Class C Vehicles and 2 Class V Vehicles	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	90
4	SMSC	2 Class C Vehicles and 2 Class V Vehicles	5	5	5	5	5	5	4	5	5	5	5	5	5	3	5	5	3	4	84

\*Scores of three or less are in red text and scores of one or less are in red text and highlighted yellow.

## Quantitative Scores

### A. Quantitative Evaluation Criteria

Criterion 2A			Criterion 7A			Criterion 7B		
<u>Description:</u> The percentage of those served by the proposed serve that are members of the Target Population			<u>Description:</u> The proposed Minimum Service Hours per Week, as indicated in the Scope of Work			<u>Description:</u> The cost per One-Way Passenger Trip (OWPT), as indicated in the Scope of Work		
<u>Applicable Project Types:</u> <b>All</b>			<u>Applicable Project Types:</u> <b>All</b>			<u>Applicable Project Types:</u> <b>Capital - Contract Transportation Service and Operating Projects</b>		
Minimum Percentage	Maximum Percentage	Points	Minimum Hours	Maximum Hours	Points	Minimum Value	Maximum Value	Points
0%	80%	0	0	19	0	0	14.99	5
80%	85%	1	20	24	1	15	29.99	4
85%	90%	2	25	29	2	30	44.99	3
90%	95%	3	30	34	3	45	59.99	2
95%	100%	4	35	39	4	60	74.99	1
100%	100%	5	40	168	5	75	1000	0

### B. Quantitative Scores

#### Capital - Contracted Transportation Service and Operating Projects

Shortened Applicant Name	Shortened Project Name	Criterion 2A		Criterion 7A		Criterion 7B		Total Score
		Proposed Percentage (Indicated in Project Scope of Work)	Total Points Based on Evaluation Criteria	Proposed Hours (Indicated in Project Scope of Work)	Total Points Based on Evaluation Criteria	Proposed Cost (Indicated in Project Scope of Work)	Total Points Based on Evaluation Criteria	
Tri-City	Patient Transportation	100%	5	30	3	\$17.18	4	12
JFS	On the Go	100%	5	84	5	\$28.88	4	14
TASD	Senior Solutions	100%	5	40	5	\$26.56	4	14
SMSC	Mileage Reimbursement	100%	5	40	5	\$2.16	5	15
ArcSD	MCRD Contracted Transportation	100%	5	57	5	\$24.31	4	14

#### Mobility Management Projects

Shortened Applicant Name	Shortened Project Name	Criterion 2A		Criterion 7A		Total Score
		Proposed Percentage (Indicated in Project Scope of Work)	Total Points Based on Evaluation Criteria	Proposed Hours (Indicated in Project Scope of Work)	Total Points Based on Evaluation Criteria	
TASD	RIDEFinder	100%	5	40	5	10

#### Capital - Vehicle and Other Equipment Procurement Projects\*

Shortened Applicant Name	Shortened Project Name	Criterion 2A		Criterion 7A		Total Score
		Proposed Percentage (Indicated in Project Scope of Work)	Total Points Based on Evaluation Criteria	Proposed Hours (Indicated in Project Scope of Work)	Total Points Based on Evaluation Criteria	
Tri-City	1 Class B Vehicle	100%	5	30	3	8
Tri-City	1 Class B Vehicle	100%	5	30	3	8
Tri-City	1 Class D Vehicle	100%	5	30	3	8
Noah Homes	1 Class Z-1 Vehicle	100%	5	20	1	6
Noah Homes	1 Class Z-1 Vehicle	100%	5	20	1	6
Noah Homes	1 Class Z-1 Vehicle	100%	5	20	1	6
Noah Homes	1 Class Z-1 Vehicle	100%	5	20	1	6
Sharp	1 Class C Vehicle	100%	5	32	3	8
Sharp	1 Class C Vehicle	100%	5	32	3	8

## Quantitative Scores

MTS	1 Class B Vehicle	100%	5	32	3	8
MTS	1 Class B Vehicle	100%	5	32	3	8
MTS	1 Class B Vehicle	100%	5	32	3	8
MTS	1 Class B Vehicle	100%	5	32	3	8
MTS	1 Class B Vehicle	100%	5	32	3	8
MTS	1 Class B Vehicle	100%	5	32	3	8
MTS	1 Class B Vehicle	100%	5	32	3	8
MTS	1 Class B Vehicle	100%	5	32	3	8
HGH	1 Class C Vehicle	100%	5	32	3	8
HGH	1 Class C Vehicle	100%	5	32	3	8
HGH	1 Class C Vehicle	100%	5	32	3	8
HGH	1 Class V Vehicle	100%	5	32	3	8
HGH	1 Class V Vehicle	100%	5	32	3	8
HGH	Fleet Management Software*	100%	5	160	5	10
SPSS	1 Class V Vehicle	100%	5	35	4	9
SPSS	1 Class V Vehicle	100%	5	35	4	9
SPSS	1 Class V Vehicle	100%	5	35	4	9
SPSS	1 Class V Vehicle	100%	5	35	4	9
SPSS	1 Class V Vehicle	100%	5	35	4	9
SPSS	1 Class V Vehicle	100%	5	35	4	9
SPSS	1 Class V Vehicle	100%	5	35	4	9
SPSS	1 Class V Vehicle	100%	5	35	4	9
SPSS	1 Class V Vehicle	100%	5	35	4	9
SMSC	1 Class C Vehicle	100%	5	20	1	6
SMSC	1 Class C Vehicle	100%	5	20	1	6
SMSC	1 Class V Vehicle	100%	5	20	1	6
SMSC	1 Class V Vehicle	100%	5	20	1	6

\*Quantitative scores are judged based on equipment project for the Capital category because each equipment could have different hours of service and this way applicants that apply for multiple equipment types are not at an advantage.

\*Vehicle Service Hours were totaled for HGH's Fleet Software project because it will be the least amount of hours needed for software requested.

## Past Performance Adjustment

Past Performance Adjustment is a method that would connect information on an Applicant's recent performance for one or more prior Specialized Transportation Grant Program (STGP) projects to the Applicant's proposed project(s) through the STGP. It is intended to discourage poor performance and reward strong performance. Past Performance Adjustment scores are based on an assessment of an Applicant's performance during a review period. For the STGP Cycle 13 Call for Projects, the Past Performance Adjustment Review Period is July 1, 2023, through June 30, 2024, to coincide with SANDAG's fiscal year, the Specialized Transportation Grant Program monitoring schedule, and the Cycle 13 timeline. Applicants that have never held an STGP grant or applicants that have not held an STGP grant within the Past Performance Adjustment Review Period would not receive a Past Performance Adjustment. Additionally, if the duration of an STGP grant that occurred in the Past Performance Review Period was three months or fewer, SANDAG would exempt this grant from the calculation of the Past Performance Adjustment score due to insufficient performance data.

SANDAG staff uses a standardized monitoring checklist that the grantees sign off on to monitor grantee compliance with its STGP grant agreement(s). Consistent with this monitoring checklist, staff would determine Past Performance Adjustment scores based on three indicators and weights, shown in bold text and discussed below. For the first and third indicators, the monitoring checklist poses multiple questions that an STGP Program Manager completes with "Yes," "No," or "Not applicable." "No" responses may indicate a compliance deficiency. The number of points assigned for the first and third indicators would be based on the percentage of affirmative responses to the total applicable questions.

An Applicant would receive a Past Performance Adjustment score for each STGP grant it has held within the Past Performance Adjustment Review Period. If an Applicant has two or more STGP grants of the same project type within the Past Performance Review Period, an average of the Past Performance Adjustment scores would be calculated so that the Applicant would receive one Past Performance Adjustment score by project type. If an Applicant has held an active STGP grant of one project type within the Past Performance Review Period but is applying for grant funds under a different project type, then the Past Performance Adjustment score would be based only on the first indicator, Grantee Compliance. Past Performance Adjustment scores would range from -15 to +5 points.\* Past performance adjustments is something that has been employed by STGP since 2012/Cycle 7. At that time, SANDAG staff worked with a subcommittee of the Social Services Transportation Advisory Council (SSTAC) [composed of social service agencies, individuals, transportation providers, and the Consolidated Transportation Services Agency] to develop a proposed methodology to incorporate the past performance of grantees in the final scoring and ranking of projects for grant funding. Past performance scores were graded in an objective fashion based on an updated and peer reviewed standardized monitoring checklist and existing grantees did have an opportunity to review and sign off on their past performance scores.

### A. Past Performance Adjustment Evaluation Criteria

Criterion 1 Grantee Compliance			Criterion 2 Units of Service Delivered			Criterion 3 Grant Agreement Compliance		
This indicator assesses the extent to which STGP grantees comply with cross-cutting requirements applicable to multiple grants and project types. If an Applicant has held an active STGP grant of one grant type within the Past Performance Review Period but is applying for grant funds under a different grant type, then the Past Performance Adjustment score would be based only on the Criterion 1.			This indicator compares the actual number of units of service delivered during the Past Performance Review Period to the proportional number of units of service proposed in the STGP Cycle 12 Call for Projects application and agreed to in the grant agreement. Criterion 2 scores are only based on the project type performance requested. Example: Capital application past performance score is from their previous capital project performance only, not their operating or mobility management performance. Each project type has specific project compliance requirements so this ensures other project type scores do not interfere with the reflection of performance.			This indicator assesses the extent to which an STGP grantee complies with requirements specific to its STGP grant agreement(s). Criterion 3 scores are only based on the project type performance requested. Example: Capital application past performance score is from their previous capital project performance only, not their operating or mobility management performance. Each project type has specific project compliance requirements so this ensures other project type scores do not interfere with the reflection of performance.		
Criterion Weight: 40%			Criterion Weight: 40%			Criterion Weight: 20%		
Minimum Percentage	Maximum Percentage	Points	Minimum Percentage	Maximum Percentage	Points	Minimum Percentage	Maximum Percentage	Points
0.00%	59.99%	-6.0	-1000.00%	-30.00%	-6.0	0.00%	59.99%	-3.0
60.00%	64.99%	-5.0	-29.99%	-25.00%	-5.0	60.00%	64.99%	-2.5
65.00%	69.99%	-4.0	-24.99%	-20.00%	-4.0	65.00%	69.99%	-2.0
70.00%	74.99%	-3.0	-19.99%	-15.00%	-3.0	70.00%	74.99%	-1.5
75.00%	79.99%	-2.0	-14.99%	-10.00%	-2.0	75.00%	79.99%	-1.0
80.00%	84.99%	-1.0	-5.00%	-9.99%	-1.0	80.00%	84.99%	-0.5
85.00%	89.99%	0.0	-4.99%	4.99%	0.0	85.00%	89.99%	0.0
90.00%	94.99%	1.0	5.00%	9.99%	1.0	90.00%	94.99%	0.5
95.00%	100.00%	2.0	10.00%	200.00%	2.0	95.00%	100.00%	1.0

### B. Past Performance Adjustment (PPA) Quantitative Scores

Shortened Applicant Name	Shortened Project Name	Project Type	Was an FY24 Grantee?	Was an FY24 Applicable Project Type Grantee?	Criterion 1		Criterion 2		Criterion 3		Total PPA Score
					Monitoring Score	Total Points Based on Evaluation Criteria	Average of Monitoring Scores	Total Points Based on Evaluation Criteria	Average of Monitoring Scores	Total Points Based on Evaluation Criteria	
Noah Homes	4 Class Z-1 Vehicles	CAP - Procurement	Yes	Yes*	100.00%	2.00	N/A	N/A	92.51%	0.50	2.50
Sharp	2 Class C Vehicles	CAP - Procurement	Yes	Yes*	100.00%	2.00	-59.14%	-6.00	96.67%	1.00	-3.00
ArcSD	MCRD Contracted Transportation	CAP - Contracted Transportation	Yes	Yes	100.00%	2.00	85.00%	2.00	81.82%	-0.50	3.50
MTS	8 Class B Vehicles	CAP - Procurement	Yes	Yes*	100.00%	2.00	-66.60%	-6.00	95.33%	1.00	-3.00
JFS	OTG 5310	OP	Yes	Yes	96.00%	2.00	77.00%	2.00	98.20%	1.00	5.00
TASSD	RIDEFinder 5310	MM	Yes	Yes	100.00%	2.00	21.00%	2.00	100.00%	1.00	5.00
TASSD	Senior Solutions 5310	OP	Yes	Yes	100.00%	2.00	106.50%	2.00	100.00%	1.00	5.00
HGH	3 Class C Vehicles and 2 Class V Vehicles with Fleet Software	CAP - Procurement	Yes	Yes*	100.00%	2.00	N/A	N/A	100.00%	1.00	3.00
SMSC	Mileage Reimbursement	OP	Yes	Yes	100.00%	2.00	32.00%	2.00	100.00%	1.00	5.00
SMSC	2 Class C Vehicles and 2 Class V Vehicles	CAP - Procurement	Yes	Yes*	100.00%	2.00	-11.00%	-2.00	96.67%	1.00	1.00
Tri-City	Patient Transport	OP	No	No**	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Tri-City	2 Class B Vehicles and 1 Class D Vehicle	CAP - Procurement	No	No**	N/A	N/A	N/A	N/A	N/A	N/A	N/A
SPSS	10 Class V Vehicles	CAP - Procurement	No	No***	N/A	N/A	N/A	N/A	N/A	N/A	N/A

\*These applicants had older vehicle grants (Cycles 8 and 9) that did not have Units of Service. Therefore, Criterion 2 is Not Applicable (N/A) for those grants and they are not included in the Average of Monitoring Scores.

\*\*Tri-City was not an FY24 grantee, so they did not receive a Past Performance Adjustment per the Call for Projects.

\*\*\*SPSS did not have a grant that was active for three months or longer during FY24, so they did not receive any Past Performance Adjustment per the Call for Projects.

Negative scores are in red text.

## Past Performance Adjustment

### Criterion 1. Grantee Compliance Score Summary (40% of Total Monitoring Score)

Applicant	Total Affirmative Responses	Total Applicable Questions	Percentage of Affirmative Responses	Score
JFS	24	25	96.00%	2
MTS	22	22	100.00%	2
Sharp	17	17	100.00%	2
TASSD	23	23	100.00%	2
ArcSD	21	21	100.00%	2
HGH	16	16	100.00%	2
Noah Homes	19	19	100.00%	2
SMSC	18	18	100.00%	2



## Past Performance Adjustment

### Criterion 2. Units of Service Score Summary (40% of Total Monitoring Score)

Applicant	Agreement Number	Cycle Number	FY24 Months Active	Grant Type	Target Quantity	Actual Units of Service Delivered	Percent Above or Below Target Units	Score
ArcSD	S893921	11	11	Capital/Contracted Services	9,342	17,300	85%	2
HGH	5005202	9*	12	Capital/Equipment	Not Applicable	Not Applicable	Not Applicable	Not Applicable
HGH	5004691	8*	12	Capital/Equipment	Not Applicable	Not Applicable	Not Applicable	Not Applicable
JFS	S980734	11	6	Operating	6,637	25,646	286%	2
JFS	S980735	11	9	Operating	9,956	11,360	14%	2
JFS	S893828	11	6	Operating	6,638	5,383	-19%	-4
JFS	S1213367	12	9	Operating	29,868	45,510	52%	2
JFS	S1213368	12	9	Operating	29,868	45,510	52%	2
MTS	5005206	9*	10	Capital/Equipment	Not Applicable	Not Applicable	Not Applicable	Not Applicable
MTS	5005914	10	12	Capital/Equipment	25,480	8,510	-67%	-6
MTS	S1053431	11**	12	Capital/Equipment	Not Applicable	Not Applicable	Not Applicable	Not Applicable
Noah Homes	5005201	8*	9	Capital/Equipment	Not Applicable	Not Applicable	Not Applicable	Not Applicable
Sharp	5004695	8*	9	Capital/Equipment	Not Applicable	Not Applicable	Not Applicable	Not Applicable
Sharp	5005205	9*	10	Capital/Equipment	Not Applicable	Not Applicable	Not Applicable	Not Applicable
Sharp	5005908	10	12	Capital/Equipment	41,496	16,956	-59%	-6
SMSC	5004688	8*	12	Capital/Equipment	Not Applicable	Not Applicable	Not Applicable	Not Applicable
SMSC	5005203	9*	12	Capital/Equipment	Not Applicable	Not Applicable	Not Applicable	Not Applicable
SMSC	5005909	10	12	Capital/Equipment	11,184	9,941	-11%	-3
SMSC	S893856	11	12	Operating	139,636	183,630	32%	2
TASSD	S1213369	12	9	Mobility Management	24,000	29,066	21%	2
TASSD	S1213199	12	12	Operating	106,000	167,081	58%	2
TASSD	S1213364	12	9	Operating	3,330	8,496	155%	2

\*Cycle 8 and 9 projects did not have Units of Service targets. Criterion 2 is Not Applicable.

\*\*MTS Cycle 11 project contained Units of Service targets, but the vehicles had not yet been delivered. Criterion 2 is Not Applicable.

## Past Performance Adjustment

### 4. Grant Agreement Compliance (20% of Total Monitoring Score)

Applicant	Agreement Number	Cycle Number	FY24 Months Active	Grant Type	Total Affirmative Responses	Total Applicable Questions	Percentage of Affirmative Responses	Score
ArcSD	S893921	11	11	Capital/Contracted Services	9	11	81.82%	-0.5
HGH	5005202	9	12	Capital/Equipment	9	9	100%	2
HGH	5004691	8	12	Capital/Equipment	10	10	100%	2
JFS	S980734	11	6	Operating	11	11	100%	2
JFS	S980735	11	9	Operating	11	11	100%	2
JFS	S893828	11	6	Operating	11	11	100%	2
JFS	S1213367	12	9	Operating	11	11	100%	2
JFS	S1213368	12	9	Operating	10	11	91%	1.5
MTS	5005206	9	10	Capital/Equipment	11	11	100%	2
MTS	5005914	10	12	Capital/Equipment	12	14	86%	0
MTS	S1053431	11	12	Capital/Equipment	4	4	100%	2
Noah Home	5005201	8	9	Capital/Equipment	12	13	92.31%	1.5
Sharp	5004695	8	9	Capital/Equipment	11	11	100%	2
Sharp	5005205	9	10	Capital/Equipment	11	11	100%	2
Sharp	5005908	10	12	Capital/Equipment	9	10	90%	1.5
SMSC	5004688	8	12	Capital/Equipment	9	9	100%	2
SMSC	5005203	9	12	Capital/Equipment	10	10	100%	2
SMSC	5005909	10	12	Capital/Equipment	9	10	90%	1.5
SMSC	S893856	11	12	Operating	12	12	100%	2
TASSD	S1213369	12	9	Mobility Management	12	12	100%	2
TASSD	S1213199	12	12	Operating	9	9	100%	2
TASSD	S1213364	12	9	Operating	12	12	100%	2

## SMG Funding Recommendations

Applicant Name	Shortened Project Name	Project Type	Average Evaluator Score	Past Performance Adjustment <sup>1</sup>	Quantitative Score	Total Application Score	Grant Request	Recommended Grant Award
TASSD	SenioRide	Operating	79.75	5.00	15	99.75	\$ 720,000	\$ 720,000
TASSD	RIDEFinder	Mobility Management	83.00	5.00	10	98.00	\$ 100,000	\$ 100,000
PSC	Out & About	Operating	78.25	4.00	15	97.25	\$ 124,000	\$ 124,000
JFS	On the Go SMG	Operating	78.75	5.00	13	96.75	\$ 1,000,000	\$ 1,000,000
ElderHelp	Seniors A Go Go	Operating	78.25	4.00	14	96.25	\$ 322,795	\$ 322,795
FACT	CTSA Services	Mobility Management	84.00	2.00	10	96.00	\$ 762,498	\$ 614,222
FACT	RideFACT	Operating	79.75	2.00	14	95.75	\$ 237,500	\$ -
Borrego Springs	Lets Go Borrego	Operating	66.00	N/A	8	74.00	\$ 190,853	\$ -
Non-Responsive Applicant	Non-Responsive Project	Mobility Management	0	0.00	0	0.00	\$ 134,090	\$ -
						<b>SMG Totals</b>	<b>\$ 3,591,736</b>	<b>\$ 2,881,017</b>

Recommended for full funding

Recommended for partial funding

Not recommended for funding

**Notes**

1

Applicants who have never held an STGP grant did not receive a Past Performance Adjustment.

TransNet SMG Pass-Through Revenue Available as of 2/14/25	\$ 2,881,017.00
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## SANDAG Specialized Transportation Grant Program

### Cycle 13 Call for Projects: SMG Program

Application ID	Applicant Name	Shortened Applicant Name	Project Name	Shortened Project Name	Project Type	Shortened Project Type	Project Description
C13-SMG-1	Jewish Family Service of San Diego	JFS	On the Go SMG	On the Go SMG	Operating	OP	On the Go (OTG) will continue serving senior residents and senior service organizations of Greater San Diego utilizing Rides & Smiles volunteer donation based driving program, OTG Navigator sliding scale fee based for urgent requests, meal delivery, and OTG fee based Shuttles. The program may expand/adjust service boundaries within the proposed zip codes. OTG staff drivers and Transportation Network Companies will provide back up for Rides & Smiles rides not selected by a volunteer. It provides rides to/from appointments and activities up to 25 miles of the rider's residence or centralized pick up point. It also offers personalized assistance required by seniors suffering from physical and mental disabilities, including assistance getting in and out of vehicle or utilizing vehicle lift system.
C13-SMG-2	Travelers Aid Society of San Diego	TASSD	RIDEFinder SMG	RIDEFinder SMG	Mobility Management	MM	RIDEFinder will improve access to existing transportation services within the large urbanized area of SD County to low income older adults, ages 65 and over and persons with disabilities of any age. This will be accomplished through coordination efforts with agency partners, information & referral services, matching transportation needs of our clients to available resources, and by providing training to allow individuals to better utilize public transportation where appropriate.
C13-SMG-3	Travelers Aid Society of San Diego	TASSD	SenioRide	SenioRide	Operating	OP	SenioRide is a project designed to reduce the isolation of low-income seniors ages 60+, while increasing their mobility and independence. The project provides individualized, free transportation options, including: door-to-door & door-through-door services utilizing volunteer drivers, SDM MTS Pronto Cards, MTS Access vouchers & NCTD LIFT tickets, and taxicab vouchers or 1:1 rides with partner agency services and/or ride share services like Uber or Lyft.
C13-SMG-5	Facilitating Access to Coordinated Transportation (FACT)	FACT	CTSA Services	CTSA Services	Mobility Management	MM	FACT will provide enhanced mobility management services to the region that improves coordination among specialized transportation providers, resulting in an increase in the number of trips provided to seniors and individuals with disabilities over the grant term. This will be accomplished through additional telephone referral services, brokerage management, accessible vehicle sharing, technical assistance, regional coordination, and research besides those services provided under the Consolidated Transportation Service Agency contract with SANDAG.
C13-SMG-7	Peninsula Shephard Center	PSC	Out and About Peninsula Senior Transportation Program	Out & About	Operating	OP	Peninsula Shepherd Center provides seniors age sixty and older living in the zip codes of 932106, 92107 and 92110 with transportation services including door-through-door van shuttle and volunteer/escort programs.
C13-SMG-8	ElderHelp of San Diego	ElderHelp	Seniors A Go Go	Seniors A Go Go	Operating	OP	Seniors A Go Go (SAGG) is an established volunteer driver program that provides door through door, door to door, and curb to curb transportation options for seniors aged 60 and older. The program ensures seniors arrive safely to and from their appointments and errands. SAGG is an affordable option for seniors, many of whom are low income, charging no set fees and inviting seniors to pay what they can instead. Volunteers are trained to safely transport seniors to and from their appointments.

## SMG Evaluator 1 Score Sheet

### Evaluator Instructions:

**Step 1:** Review the STGP Cycle 13 Evaluation Criteria and Scoring Rubric included in your Evaluator Packet.

**Step 2:** Score each project application's qualitative responses using the Evaluation Criteria and Scoring Rubric. Please do not fill blanks that are black. SANDAG scores these criteria. While most qualitative responses can be found in the Project Narrative section of the Project Application, others can be found in the Project Scope of Work and other application materials. SANDAG scores the quantitative responses against the quantitative evaluation criteria, which vary based on project type. To score the qualitative responses, enter an integer not greater than the maximum number of points allowed for the qualitative response you are scoring. The scoring cells contain formulas that will not allow you to enter a number greater than the maximum points allowed for the qualitative criteria you are scoring; neither will they allow you to enter half-points. Do not enter a zero unless a response to a criterion is missing or is so incomplete or incoherent that you cannot reasonably understand or infer the meaning of the response. The Total Score will auto populate.

## Step 2: Score Project Applications

### Step 2a: Score Capital - Contract Transportation Service and Operating Projects

Shortened Applicant Name	Shortened Project Name		Evaluation Criteria																				Total Evaluator Score
			1			2				3		4			5		6	7		8			
			A	B	C	A	B	C	D	A	B	A	B	C	A	B	A	A	B	A	B	C	
JFS	OTG		4	4	4		1	4	4	4	5	4	5	3	4	5	4			4	4	3	66
Borrego Springs	Let's Go Borrego		3	3	2		5	4	3	2	2	4	2	2	3	2	1			3	2	3	46
TASSD	SenioRide		4	5	4		4	4	5	4	4	5	5	3	4	4	5			3	4	4	71
FACT	RideFACT		4	4	4		5	4	4	4	3	4	2	3	4	5	5			5	4	4	68
PSC	Out & About		3	4	4		5	4	4	4	4	4	3	4	4	4	3			4	4	3	65
ElderHelp	Seniors A Go Go		3	4	4		4	4	4	4	4	4	5	3	4	5	4			4	4	3	67

### Step 2b: Score Mobility Management Projects

Shortened Applicant Name	Shortened Project Name		Evaluation Criteria																		Total Evaluator Score		
			1			2				3		4			5		6	7		8			
			A	B	C	A	B	C	D	A	B	A	B	C	A	B	A	A	B	A		B	C
TASSD	RIDEfinder		4	5	4		3	4	5	7		4	4	3	4	4	3		4	3	3	3	67
FACT	CTSA		4	4	4		4	5	5	9		4	4	3	4	4	2		4	3	4	3	70

## SMG Evaluator 2 Score Sheet

### Evaluator Instructions:

**Step 1:** Review the STGP Cycle 13 Evaluation Criteria and Scoring Rubric included in your Evaluator Packet.

**Step 2:** Score each project application's qualitative responses using the Evaluation Criteria and Scoring Rubric. Please do not fill blanks that are black. SANDAG scores these criteria. While most qualitative responses can be found in the Project Narrative section of the Project Application, others can be found in the Project Scope of Work and other application materials. SANDAG scores the quantitative responses against the quantitative evaluation criteria, which vary based on project type. To score the qualitative responses, enter an integer not greater than the maximum number of points allowed for the qualitative response you are scoring. The scoring cells contain formulas that will not allow you to enter a number greater than the maximum points allowed for the qualitative criteria you are scoring; neither will they allow you to enter half-points. Do not enter a zero unless a response to a criterion is missing or is so incomplete or incoherent that you cannot reasonably understand or infer the meaning of the response. The Total Score will auto populate.

### Step 2: Score Project Applications

#### Step 2a: Score Capital - Contract Transportation Service and Operating Projects

Shortened Applicant Name	Shortened Project Name		Evaluation Criteria																		Total Evaluator Score		
			1			2				3		4			5		6	7		8			
			A	B	C	A	B	C	D	A	B	A	B	C	A	B	A	A	B	A		B	C
JFS	OTG		5	5	5		5	5	5	5	5	5	5	5	5	3			5	5	5	83	
Borrego Springs	Let's Go Borrego		5	3	2		5	5	5	4	3	5	5	2	5	5	3			5	5	5	72
TASSD	SenioRide		5	5	5		5	5	5	5	5	5	5	5	5	5	3			5	5	5	83
FACT	RideFACT		5	5	5		5	5	5	5	5	5	5	5	5	5	3			5	5	5	83
PSC	Out & About		5	5	5		5	5	5	5	5	5	5	3	5	5	3			5	5	5	81
ElderHelp	Seniors A Go Go		5	5	5		5	5	4	4	4	5	5	5	5	5	3			5	5	5	80

#### Step 2b: Score Mobility Management Projects

Shortened Applicant Name	Shortened Project Name		Evaluation Criteria																					Total Evaluator Score
			1			2				3		4			5		6	7		8				
			A	B	C	A	B	C	D	A	B	A	B	C	A	B	A	A	B	A	B	C		
TASSD	RIDEFinder		5	5	5		5	5	5	10		5	5	5	5	5	3		5	5	5	5	88	
FACT	CTSA		5	5	5		5	5	5	10		5	5	5	5	5	3		5	5	5	5	88	

## SMG Evaluator 3 Score Sheet

### Evaluator Instructions:

**Step 1:** Review the STGP Cycle 13 Evaluation Criteria and Scoring Rubric included in your Evaluator Packet.

**Step 2:** Score each project application's qualitative responses using the Evaluation Criteria and Scoring Rubric. Please do not fill blanks that are black. SANDAG scores these criteria. While most qualitative responses can be found in the Project Narrative section of the Project Application, others can be found in the Project Scope of Work and other application materials. SANDAG scores the quantitative responses against the quantitative evaluation criteria, which vary based on project type. To score the qualitative responses, enter an integer not greater than the maximum number of points allowed for the qualitative response you are scoring. The scoring cells contain formulas that will not allow you to enter a number greater than the maximum points allowed for the qualitative criteria you are scoring; neither will they allow you to enter half-points. Do not enter a zero unless a response to a criterion is missing or is so incomplete or incoherent that you cannot reasonably understand or infer the meaning of the response. The Total Score will auto populate.

### Step 2: Score Project Applications

#### Step 2a: Score Capital - Contract Transportation Service and Operating Projects

Shortened Applicant Name	Shortened Project Name		Evaluation Criteria																		Total Evaluator Score		
			1			2				3		4			5		6	7		8			
			A	B	C	A	B	C	D	A	B	A	B	C	A	B	A	A	B	A		B	C
JFS	OTG		5	5	5		5	5	5	5	5	5	5	5	5	5			5	5	5	85	
TASSD	SenioRide		5	5	5		5	5	5	5	5	5	4	5	5	5	5			5	5	5	84
Borrego Springs	Let's Go Borrego		5	5	5		5	5	5	5	5	5	5	5	5	5	4			5	5	5	84
FACT	RideFACT		5	5	5		5	5	5	5	5	5	5	5	5	5	5			4	5	5	84
PSC	Out & About		5	5	5		5	5	5	5	5	5	5	5	5	5	5			5	5	5	85
ElderHelp	Seniors A Go Go		5	5	5		5	5	5	5	5	5	5	5	5	5	5			5	5	5	85

#### Step 2b: Score Mobility Management Projects

Shortened Applicant Name	Shortened Project Name		Evaluation Criteria																		Total Evaluator Score		
			1			2				3		4			5		6	7		8			
			A	B	C	A	B	C	D	A	B	A	B	C	A	B	A	A	B	A		B	C
TASSD	RIDEFinder		5	5	5		5	5	5	10		5	5	5	5	5	5		5	5	5	5	90
FACT	CTSA		5	5	5		4	5	5	10		5	5	5	5	5	5		5	5	5	5	89

## SMG Evaluator 4 Score Sheet

### Evaluator Instructions:

**Step 1:** Review the STGP Cycle 13 Evaluation Criteria and Scoring Rubric included in your Evaluator Packet.

**Step 2:** Score each project application's qualitative responses using the Evaluation Criteria and Scoring Rubric. Please do not fill blanks that are black. SANDAG scores these criteria. While most qualitative responses can be found in the Project Narrative section of the Project Application, others can be found in the Project Scope of Work and other application materials. SANDAG scores the quantitative responses against the quantitative evaluation criteria, which vary based on project type. To score the qualitative responses, enter an integer not greater than the maximum number of points allowed for the qualitative response you are scoring. The scoring cells contain formulas that will not allow you to enter a number greater than the maximum points allowed for the qualitative criteria you are scoring; neither will they allow you to enter half-points. Do not enter a zero unless a response to a criterion is missing or is so incomplete or incoherent that you cannot reasonably understand or infer the meaning of the response. The Total Score will auto populate.

### Step 2: Score Project Applications

#### Step 2a: Score Capital - Contract Transportation Service and Operating Projects

Shortened Applicant Name	Shortened Project Name		Evaluation Criteria																					Total Evaluator Score
			1			2				3		4			5		6	7		8				
			A	B	C	A	B	C	D	A	B	A	B	C	A	B	A	A	B	A	B	C		
JFS	OTG		5	5	5		5	5	5	5	5	5	5	3	5	5	5			5	5	3	81	
TASSD	SenioRide		5	5	5		5	5	5	5	3	5	5	5	5	5	5			3	5	5	81	
Borrego Springs	Let's Go Borrego		5	5	5		5	5	3	1	2	5	5	5	5	3	1			3	1	3	62	
FACT	RideFACT		5	5	5		5	5	5	5	5	5	5	5	5	5	5			5	5	4	84	
PSC	Out & About		5	5	5		5	5	5	5	5	5	5	5	5	5	3			5	5	4	82	
ElderHelp	Seniors A Go Go		5	5	5		5	5	5	5	4	4	5	5	5	5	5			5	5	3	81	

#### Step 2b: Score Mobility Management Projects

Shortened Applicant Name	Shortened Project Name		Evaluation Criteria																					Total Evaluator Score
			1			2				3		4			5		6	7		8				
			A	B	C	A	B	C	D	A	B	A	B	C	A	B	A	A	B	A	B	C		
TASSD	RIDEFinder		5	5	5		5	5	5	10		5	5	3	5	5	5		5	5	5	4	87	
FACT	CTSA		5	5	5		5	5	5	10		5	5	5	5	5	5		5	5	5	4	89	



## SMG Evaluator Scores

### Capital - Contracted Transportation Service and Operating Projects

Application ID	Evaluator Number	Shortened Applicant Name	Shortened Project Name	1A	1B	1C	2B	2C	2D	3A	3B	4A	4B	4C	5A	5B	6A	8A	8B	8C	Total Evaluator Score
C13-SMG-1	1	JFS	OTG	4	4	4	1	4	4	4	5	4	5	3	4	5	4	4	4	3	66
C13-SMG-1	2	JFS	OTG	5	5	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5	83
C13-SMG-1	3	JFS	OTG	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	85
C13-SMG-1	4	JFS	OTG	5	5	5	5	5	5	5	5	5	5	3	5	5	5	5	5	3	81
C13-SMG-4	1	Borrego Springs	Let's Go Borrego	3	3	2	5	4	3	2	2	4	2	2	3	2	1	3	2	3	46
C13-SMG-4	2	Borrego Springs	Let's Go Borrego	5	3	2	5	5	5	4	3	5	5	2	5	5	3	5	5	5	72
C13-SMG-4	3	Borrego Springs	Let's Go Borrego	5	5	5	5	5	5	5	5	5	5	5	5	5	4	5	5	5	84
C13-SMG-4	4	Borrego Springs	Let's Go Borrego	5	5	5	5	5	3	1	2	5	5	5	5	3	1	3	1	3	62
C13-SMG-3	1	TASSD	SenioRide	4	5	4	4	4	5	4	4	5	5	3	4	4	5	3	4	4	71
C13-SMG-3	2	TASSD	SenioRide	5	5	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5	83
C13-SMG-3	3	TASSD	SenioRide	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	84
C13-SMG-3	4	TASSD	SenioRide	5	5	5	5	5	5	5	3	5	5	5	5	5	5	3	5	5	81
C13-SMG-6	1	FACT	RideFACT	4	4	4	5	4	4	4	3	4	2	3	4	5	5	5	4	4	68
C13-SMG-6	2	FACT	RideFACT	5	5	5	5	5	5	5	5	5	5	5	5	5	3	5	5	5	83
C13-SMG-6	3	FACT	RideFACT	5	5	5	5	5	5	5	5	5	5	5	5	5	5	4	5	5	84
C13-SMG-6	4	FACT	RideFACT	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	4	84
C13-SMG-7	1	PSC	Out & About	3	4	4	5	4	4	4	4	3	4	4	4	4	3	4	4	3	65
C13-SMG-7	2	PSC	Out & About	5	5	5	5	5	5	5	5	5	5	3	5	5	3	5	5	5	81
C13-SMG-7	3	PSC	Out & About	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	85
C13-SMG-7	4	PSC	Out & About	5	5	5	5	5	5	5	5	5	5	5	5	5	3	5	5	4	82
C13-SMG-4	1	ElderHelp	Seniors A Go Go	3	4	4	4	4	4	4	4	4	5	3	4	5	4	4	4	3	67
C13-SMG-4	2	ElderHelp	Seniors A Go Go	5	5	5	5	5	4	4	4	5	5	5	5	5	3	5	5	5	80
C13-SMG-4	3	ElderHelp	Seniors A Go Go	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	85
C13-SMG-4	4	ElderHelp	Seniors A Go Go	5	5	5	5	5	5	5	4	4	5	5	5	5	5	5	5	3	81

### Mobility Management Projects

Application ID	Evaluator Number	Shortened Applicant Name	Shortened Project Name	1A	1B	1C	2B	2C	2D	3A	4A	4B	4C	5A	5B	6A	7B	8A	8B	8C	Total Evaluator Score
C13-SMG-2	1	TASSD	RIDEFinder	4	5	4	3	4	5	7	4	4	3	4	4	3	4	3	3	3	67
C13-SMG-2	2	TASSD	RIDEFinder	5	5	5	5	5	5	10	5	5	5	5	5	3	5	5	5	5	88
C13-SMG-2	3	TASSD	RIDEFinder	5	5	5	5	5	5	10	5	5	5	5	5	5	5	5	5	5	90
C13-SMG-2	4	TASSD	RIDEFinder	5	5	5	5	5	5	10	5	5	3	5	5	5	5	5	5	4	87
C13-SMG-5	1	FACT	CTSA	4	4	4	4	5	5	9	4	4	3	4	4	2	4	3	4	3	70
C13-SMG-5	2	FACT	CTSA	5	5	5	5	5	5	10	5	5	5	5	5	3	5	5	5	5	88
C13-SMG-5	3	FACT	CTSA	5	5	5	4	5	5	10	5	5	5	5	5	5	5	5	5	5	89
C13-SMG-5	4	FACT	CTSA	5	5	5	5	5	5	10	5	5	5	5	5	5	5	5	5	4	89

\*Scores of three or less are in red text and scores of one or less are in red text and highlighted yellow.

## Quantitative Scores

### A. Quantitative Evaluation Criteria

Criterion 2A			Criterion 7A			Criterion 7B		
<u>Description:</u> The percentage of those served by the proposed serve that are members of the Target Population			<u>Description:</u> The proposed Minimum Service Hours per Week, as indicated in the Scope of Work			<u>Description:</u> The cost per One-Way Passenger Trip (OWPT), as indicated in the Scope of Work		
Applicable Project Types: <b>All</b>			Applicable Project Types: <b>All</b>			Applicable Project Types: <b>Capital - Contract Transportation Service and Operating Projects</b>		
Minimum Percentage	Maximum Percentage	Points	Minimum Hours	Maximum Hours	Points	Minimum Value	Maximum Value	Points
0%	80%	0	0	19	0	\$ -	\$ 14.99	5
80%	85%	1	20	24	1	\$ 15.00	\$ 29.99	4
85%	90%	2	25	29	2	\$ 30.00	\$ 44.99	3
90%	95%	3	30	34	3	\$ 45.00	\$ 59.99	2
95%	100%	4	35	39	4	\$ 60.00	\$ 74.99	1
100%	100%	5	40	168	5	\$ 75.00	\$ 100.00	0

### B. Quantitative Scores

#### Capital - Contracted Transportation Service and Operating Projects

Shortened Applicant Name	Shortened Project Name	Criterion 2A		Criterion 7A		Criterion 7B		Total Score
		Proposed Percentage (Indicated in Project Scope of Work)	Total Points Based on Evaluation Criteria	Proposed Hours (Indicated in Project Scope of Work)	Total Points Based on Evaluation Criteria	Proposed Cost (Indicated in Project Scope of Work)	Total Points Based on Evaluation Criteria	
JFS	On the Go SMG	98%	4	84	5	\$15.69	4	13
PSC	Out & About	100%	5	44	5	\$13.48	5	15
TASSD	SenioRide	100%	5	40	5	\$2.58	5	15
Borrego Springs	Lets Go Borrego	90%	3	60	5	\$135.34	0	8
FACT	RideFACT	100%	5	60	5	\$26.50	4	14
ElderHelp	Seniors A Go Go	100%	5	60	5	\$16.31	4	14

#### Mobility Management Projects

Shortened Applicant Name	Shortened Project Name	Criterion 2A		Criterion 7A		Total Score
		Proposed Percentage (Indicated in Project Scope of Work)	Total Points Based on Evaluation Criteria	Proposed Hours (Indicated in Project Scope of Work)	Total Points Based on Evaluation Criteria	
FACT	CTSA	100%	5	83	5	10
TASSD	RideFinder	100%	5	40	5	10

## Past Performance Adjustment

Past Performance Adjustment is a method that would connect information on an Applicant's recent performance for one or more prior Specialized Transportation Grant Program (STGP) projects to the Applicant's proposed project(s) through the STGP. It is intended to discourage poor performance and reward strong performance. Past Performance Adjustment scores are based on an assessment of an Applicant's performance during a review period. For the STGP Cycle 13 Call for Projects, the Past Performance Adjustment Review Period is July 1, 2023, through June 30, 2024, to coincide with SANDAG's fiscal year, the Specialized Transportation Grant Program monitoring schedule, and the Cycle 13 timeline. Applicants that have never held an STGP grant or applicants that have not held an STGP grant within the Past Performance Adjustment Review Period would not receive a Past Performance Adjustment. Additionally, if the duration of an STGP grant that occurred in the Past Performance Review Period was three months or fewer, SANDAG would exempt this grant from the calculation of the Past Performance Adjustment score due to insufficient performance data.

SANDAG staff uses a standardized monitoring checklist that the grantees sign off on to monitor grantee compliance with its STGP grant agreement(s). Consistent with this monitoring checklist, staff would determine Past Performance Adjustment scores based on three indicators and weights, shown in bold text and discussed below. For the first and third indicators, the monitoring checklist poses multiple questions that an STGP Program Manager completes with "Yes," "No," or "Not applicable." "No" responses may indicate a compliance deficiency. The number of points assigned for the first and third indicators would be based on the percentage of affirmative responses to the total applicable questions.

An Applicant would receive a Past Performance Adjustment score for each STGP grant it has held within the Past Performance Adjustment Review Period. If an Applicant has two or more STGP grants of the same project type within the Past Performance Review Period, an average of the Past Performance Adjustment scores would be calculated so that the Applicant would receive one Past Performance Adjustment score by project type. If an Applicant has held an active STGP grant of one project type within the Past Performance Review Period but is applying for grant funds under a different project type, then the Past Performance Adjustment score would be based only on the first indicator, Grantee Compliance. Past Performance Adjustment scores would range from -15 to +5 points.<sup>\*</sup> Past performance adjustments is something that has been employed by STGP since 2012/Cycle 7. At that time, SANDAG staff worked with a subcommittee of the Social Services Transportation Advisory Council (SSTAC) (composed of social service agencies, individuals, transportation providers, and the Consolidated Transportation Services Agency) to develop a proposed methodology to incorporate the past performance of grantees in the final scoring and ranking of projects for grant funding. Past performance scores were graded in an objective fashion based on an updated and peer reviewed standardized monitoring checklist and existing grantees did have an opportunity to review and sign off on their past performance scores.

### A. Past Performance Adjustment Evaluation Criteria

Criterion 1			Criterion 2			Criterion 3		
Grantee Compliance			Units of Service Delivered			Grant Agreement Compliance		
This indicator assesses the extent to which STGP grantees comply with cross-cutting requirements applicable to multiple grants and project types. If an Applicant has held an active STGP grant of one grant type within the Past Performance Review Period but is applying for grant funds under a different grant type, then the Past Performance Adjustment score would be based only on the Criterion 1.			This indicator compares the actual number of units of service delivered during the Past Performance Review Period to the proportional number of units of service proposed in the STGP Cycle 12 Call for Projects application and agreed to in the grant agreement. Criterion 2 scores are only based on the project type performance requested. Example: Capital application past performance score is from their previous capital project performance only, not their operating or mobility management performance. Each project type has specific project compliance requirements so this ensures other project type scores do not interfere with the reflection of performance.			This indicator assesses the extent to which an STGP grantee complies with requirements specific to its STGP grant agreement(s). Criterion 3 scores are only based on the project type performance requested. Example: Capital application past performance score is from their previous capital project performance only, not their operating or mobility management performance. Each project type has specific project compliance requirements so this ensures other project type scores do not interfere with the reflection		
Criterion Weight: <b>40%</b>			Criterion Weight: <b>40%</b>			Criterion Weight: <b>20%</b>		
Minimum Percentage	Maximum Percentage	Points	Minimum Percentage	Maximum Percentage	Points	Minimum Percentage	Maximum Percentage	Points
0.00%	59.99%	-6.0	-100.00%	-30.00%	-6.0	0.00%	59.99%	-3.0
60.00%	64.99%	-5.0	-29.99%	-25.00%	-5.0	60.00%	64.99%	-2.5
65.00%	69.99%	-4.0	-24.99%	-20.00%	-4.0	65.00%	69.99%	-2.0
70.00%	74.99%	-3.0	-19.99%	-15.00%	-3.0	70.00%	74.99%	-1.5
75.00%	79.99%	-2.0	-14.99%	-10.00%	-2.0	75.00%	79.99%	-1.0
80.00%	84.99%	-1.0	-9.99%	-5.00%	-1.0	80.00%	84.99%	-0.5
85.00%	89.99%	0.0	-4.99%	4.99%	0.0	85.00%	89.99%	0.0
90.00%	94.99%	1.0	5.00%	9.99%	1.0	90.00%	94.99%	0.5
95.00%	100.00%	2.0	10.00%	200.00%	2.0	95.00%	100.00%	1.0

### B. Past Performance Adjustment (PPA) Quantitative Scores

Shortened Applicant Name	Shortened Project Name	Shortened Project Type	Was an FY24 Grantee?	Was an FY24 Applicable Project Type Grantee?	Criterion 1		Criterion 2		Criterion 3		Total PPA Score
					Monitoring Score	Total Points Based on Evaluation Criteria	Average of Monitoring Scores	Total Points Based on Evaluation Criteria	Average of Monitoring Scores	Total Points Based on Evaluation Criteria	
JFS	On the Go SMG	OP	Yes	Yes	96.00%	2.00	77.27%	2.00	98.20%	1.00	5.00
TASSD	RIDEFinder SMG	MM	Yes	Yes	100.00%	2.00	21.11%	2.00	100.00%	1.00	5.00
TASSD	SenioRide	OP	Yes	Yes	100.00%	2.00	106.38%	2.00	100.00%	1.00	5.00
FACT	CTSA Services	MM	Yes	Yes*	100.00%	2.00	N/A	N/A	88.00%	0.00	2.00
PSC	Out & About	OP	Yes	Yes	90.48%	1.00	54.00%	2.00	100.00%	1.00	4.00
ElderHelp	Seniors A Go Go	OP	Yes	Yes	100.00%	2.00	7.00%	1.00	100.00%	1.00	4.00
FACT	RideFACT	OP	Yes	No**	100.00%	2.00	N/A	N/A	N/A	N/A	2.00
Borrego Springs	Lets Go Borrego	OP	No	No***	N/A	N/A	N/A	N/A	N/A	N/A	N/A

\*FACT's Cycle 11 Mobility Management Project did not have Units of Service targets. Therefore, Criterion 2 is Not Applicable (N/A).

\*\*FACT's RideFACT Program did not have a grant that was active for three months or longer during FY24, so they only received points for Criterion 1.

\*\*\*Borrego Springs was not an FY24 grantee, so they did not receive any Past Performance Adjustment per the Call for Projects.

## Past Performance Adjustment

### Criterion 1. Grantee Compliance Score Summary (40% of Total Monitoring Score)

Applicant	Total Affirmative Responses	Total Applicable Questions	Percentage of Affirmative Responses	Score
ElderHelp	21	21	100.00%	2
FACT	28	28	100.00%	2
JFS	24	25	96.00%	2
PSC	19	21	90.48%	1
TASSD	23	23	100.00%	2

## Past Performance Adjustment

Criterion 2. Units of Service Score Summary (40% of Total Monitoring Score)								
Applicant	Agreement Number	Cycle Number	FY24 Months Active	Grant Type	Target Quantity	Actual Units of Service Delivered	Percent Above or Below Target Units	Score
ElderHelp	S1213187	12	12	Operating	10,750	11,491	7%	1
FACT	S967063	11	11	Mobility Management	Not Applicable	Not Applicable	Not Applicable	Not Applicable
FACT	S967066	11	11	Mobility Management	Not Applicable	Not Applicable	Not Applicable	Not Applicable
JFS	S980734	11	6	Operating	6,637	25,646	286%	2
JFS	S980735	11	9	Operating	9,956	11,360	14%	2
JFS	S893828	11	6	Operating	6,638	5,383	-19%	2
JFS	S1213367	12	9	Operating	29,868	45,510	52%	2
JFS	S1213368	12	9	Operating	29,868	45,510	52%	2
PSC	S988764	11	6	Operating	1,697	2,606	54%	2
TASSD	S1213369	12	9	Mobility Management	24,000	29,066	21%	2
TASSD	S1213199	12	12	Operating	106,000	167,081	58%	2
TASSD	S1213364	12	12	Operating	3,330	8,496	155%	2

\*FACT's Cycle 11 Mobility Management Project did not have Units of Service targets. Therefore, Criterion 2 is Not Applicable.

Past Performance Adjustment

Criterion 3. Grant Agreement Compliance Score Summary (20% of Total Monitoring Score)

Applicant	Agreement Number	Cycle Number	FY24 Months Active	Grant Type	Total Affirmative Responses	Total Applicable Questions	Percentage of Affirmative Responses	Score
ElderHelp	S1213187	12	12	Operating	11	11	100.00%	2
FACT	S967063	11	11	Mobility Management	13	14	93%	0.5
FACT	S967066	11	11	Mobility Management	10	12	83%	-0.5
JFS	S980734	11	6	Operating	11	11	100%	2
JFS	S980735	11	9	Operating	11	11	100%	2
JFS	S893828	11	6	Operating	11	11	100%	2
JFS	S1213367	12	9	Operating	11	11	100%	2
JFS	S1213368	12	9	Operating	10	11	91%	1.5
PSC	S988764	11	6	Operating	11	11	100%	2
TASSD	S1213369	12	9	Mobility Management	12	12	100%	2
TASSD	S1213199	12	12	Operating	9	9	100%	2
TASSD	S1213364	12	12	Operating	12	12	100%	2

## SANDAG STGP Monitoring Checklist

The San Diego Association of Governments (SANDAG) Specialized Transportation Grant Program (STGP) Monitoring Checklist assists in the monitoring of grantees. The monitoring checklist is a quantitative assessment based on three indicators 1) Grantee Compliance, 2) Units of Service Delivered and 3) Grant Agreement Compliance. For each compliance section, the monitoring checklist poses one or multiple questions that a SANDAG program manager completes with “Yes,” “No,” or “Not applicable.” “No” responses may indicate a compliance deficiency. The monitoring checklist provides space for a monitor to summarize any compliance issues or other deficiencies identified, cite the applicable section of the grant agreement, and determine appropriate follow-up actions. A completed monitoring checklist specifies the monitoring period, identifies the grant agreement for which performance and compliance monitoring was conducted, includes the date the monitoring checklist was completed, and is signed by grantee and SANDAG staff. A completed Monitoring Checklist serves as a report card for SANDAG staff and grantees on grant performance. A Monitoring Checklist may inform an STGP Past Performance Adjustment. Past performance adjustment is a method that would connect information on an Applicant’s recent performance on one or more prior Specialized Transportation Grant Program (STGP) grants to the Applicant’s proposed grant(s) through an STGP Call for Projects. It is intended to discourage poor performance and reward strong performance. For more information on the Monitoring Checklist and Past Performance Adjustments, please see the Specialized Transportation Program Management Plan.

### 1. Grantee Compliance – (40%) (-6 to +2 points possible)

This indicator assesses the extent to which STGP grantees comply with cross-cutting requirements applicable to multiple grants and grant types. For Applicants receiving a Past Performance Adjustment, this portion of the Past Performance Adjustment score(s) would be calculated once and applied to all proposed STGP projects submitted by the Applicant. This indicator includes, but is not limited to, the following topics: Ethics, Insurance, Financial management, Records retention and audits. Media and community outreach coordination, Title VI and Americans with Disabilities Act (ADA), Transit Asset Management (TAM). Points for this indicator would be assigned as shown in the following table:

Percentage of Affirmative Responses to Total Applicable Questions	Points
95-100%	2
90-94%	1
85-89%	0
80-84%	-1
75-79%	-2
70-74%	-3
65-69%	-4
60-64%	-5
0-59%	-6

### 2. Units of Service Delivered (40%) (-6 to +2 points possible)

This indicator compares the actual number of units of service delivered during the Review Period to the proportional number of units of service proposed in the STGP Cycle 12 Call for Projects application and agreed to in the grant agreement. For example, if a grantee committed to providing 10,000 one-way passenger trips (OWPTs) in a two-year STGP grant and provided 5,000 OWPTs in the one-year review period, then SANDAG would assess that the grantee reached its performance target. Units of service vary by grant type, but can include number of one-way passenger trips, hours of service, and information referrals. Points for this indicator would be assigned as shown in the following table:

Performance Quantities Range	Points
10% and above the performance target	2
5-9% above the performance target	1
Within 5% of the performance target	0
5-9% below the performance target	-1
10-14% below the performance target	-2
15-19% below the performance target	-3
20-24% below the performance target	-4
25-29% below the performance target	-5
30% and below the performance target	-6

### 3. Grant Agreement Compliance (20%) (-3 to +1 points possible)

This indicator assesses the extent to which an STGP grantee complies with requirements specific to its STGP grant agreement(s). This indicator includes, but is not limited to, the following topics: Scope of Work compliance, Grant reporting, Allowable Costs, Needs Accommodation Policy. Points for this indicator would be assigned as shown in the following table:

Percentage of Affirmative Responses to Total Applicable Questions	Points
95-100%	1
90-94%	0.5
85-89%	0
80-84%	-0.5
75-79%	-1
70-74%	-1.5
65-69%	-2
60-64%	-2.5
0-59%	-3



0			
SANDAG Fiscal Year Review Period		0	
I. Grantee Compliance (25%)			
#	Question	Response	Notes (e.g., if any response is N/A)
1	Does the grantee have a written code of conduct to govern the actions of its officers, employees, board members, or agents engaged in the award or administration of subagreements, leases, or third-party contracts? <sup>1</sup>		
2	Has the grantee submitted and maintained evidence of compliance with insurance requirements? <sup>2</sup>		
3	Did the grantee maintain an accounting system and records that separate grant expenses from non-grant-related expenses? <sup>3</sup>		Only applicable to reimbursement based grantees only.
4	Did the grantee maintain adequate financial control mechanisms (e.g., financial management system, mileage logs, expense ledgers, etc.) that properly document and segregate incurred grant costs and matching funds by line item for each grant? <sup>3</sup>		Only applicable to reimbursement based grantees only.
5	Do the grantee's record retention policies adhere to the grant agreement's record retention requirements? <sup>4</sup>		
6	Did the grantee submit a formal or informal audit, the financials of its agency, officials, and program, including, but not limited to its Single Audit, Program Audit, or an annual financial audit at least once? <sup>5</sup>		
7	If the grantee is a subrecipient and expended the more than or equal to the Single Audit Threshold in federal awards in the subrecipient's past fiscal year, did the subrecipient conduct a Single Audit or elect to have a program specific audit conducted and submit this audit to SANDAG within 9 months of the end of the fiscal year? If the grantee is not required to have a Single Audit or program-specific audit conducted, did the grantee submit to SANDAG its most recent audited financial statement? <sup>5</sup>		
8	Did the grantee submit TAM asset data by SANDAG's deadline? <sup>5</sup>		
9	Did the grantee appoint an accountable executive for TAM by SANDAG's deadline? <sup>5</sup>		
10	Did the grantee submit asset data on an annual basis by SANDAG's deadline for SANDAG to comply with National Transit Database reporting requirements? <sup>5</sup>		
11	Did the grantee track client demographic data, including frequency of client access, and provide the data to SANDAG in accordance with the PMP? <sup>5</sup>		
12	Did the grantee provide SANDAG with client testimonials at least quarterly? <sup>6</sup>		
13	Did the grantee provide photo submissions to SANDAG at least quarterly? <sup>6</sup>		
14	Did the grantee receive either no discrimination complaints or, if complaints were received, did the grantee provide written notice to SANDAG within 72 hours of receiving the complaint and work toward a resolution? <sup>7</sup>		
15	Does the grantee have a method for recording service and civil rights complaints (Title VI/ADA) and documenting the steps taken toward resolution? <sup>7</sup>		
16	Did the Section 5310 subrecipient submit Title VI Program updates on time pursuant to the PMP? <sup>8</sup>		Only applicable to Section 5310 subrecipients
17	Does the grantee have a nondiscrimination policy, a written complaint form, and complaint procedures that are posted in publicly accessible places (vehicles, website, office reception)? <sup>8</sup>		
18	Are outreach materials translated into appropriate languages given the communities served or the agency's Language Assistance Plan? <sup>8</sup>		
19	Are the grantee's policies and procedures based on offering an integrated service as defined by ADA standards? <sup>8</sup>		
20	If requested, did the grantee permit portable oxygen supplies that complied with Department of Transportation hazardous material rules? <sup>8</sup>		

21	Are the geographic service area or hours and days of service the same for all riders? <sup>8</sup>		
22	If requested, did the grantee permit service animals for individuals with disabilities in its vehicles and facilities? <sup>8</sup>		
23	Are the grantee's personnel that operate ADA equipment trained to proficiency in operation of the ADA equipment including wheelchair securement? <sup>8</sup>		
24	Are telephone wait times equivalent for persons with disabilities and persons without disabilities? <sup>8</sup>		
25	Is the provision of service the same for all riders and the days and hours to request service the same? <sup>8</sup>		
26	Are capacity constraints, including trip denials, waiting lists or trip caps the same for all riders? <sup>8</sup>		
27	Do riders with disabilities have access to the same information and reservation systems as persons without disabilities, including information in alternate formats? <sup>8</sup>		
28	Is general information including application forms, fares, schedules etc., available in alternative formats (Braille, TTY, large font)? <sup>8</sup>		
29	If the grantee held public meetings, were the meeting presentations and information provided in alternative formats upon request? <sup>8</sup>		
30	If the grantee held public meetings, were they accessible to individuals with disabilities? <sup>8</sup>		
<b>Total Applicable Questions</b>		<b>0</b>	
<b>Total Affirmative Responses</b>		<b>0</b>	
<b>Percentage of Affirmative Responses</b>		<b>0.00%</b>	
<b>Score</b>		<b>-6.00</b>	

**Citations**

- <sup>1</sup> Ethics, Grant Agreement
- <sup>2</sup> Insurance, Grant Agreement
- <sup>3</sup> Financial Management, Grant Agreement
- <sup>4</sup> Records Retention and Audits, Grant Agreement
- <sup>5</sup> Reports and Data Collection, Grant Agreement
- <sup>6</sup> Media and Community Outreach Coordination, Grant Agreement
- <sup>7</sup> Complaint Procedures, Grant Agreement
- <sup>8</sup> Nondiscrimination, Grant Agreement

0			
<b>Monitoring Start Date</b>	<b>1/0/1900</b>	<b>Monitoring End Date</b>	<b>1/0/1900</b>
<b>II. Grant Service Units (25%)<sup>1</sup></b>			
Target* Fiscal Year Number of Units of Service			
Actual Fiscal Year Number of Units of Service Delivered			
Percentage Over/Under Fiscal Year Target Units			
<b>Score</b>			
*Target is the goal unit number included in the grant agreement scope of work.			
<b>III. Grant Management (50%)</b>			
<b>#</b>	<b>Topic &amp; Question</b>	<b>Response</b>	<b>Notes (e.g., if any response is N/A)</b>
<b>Scope(s) of Work<sup>1</sup></b>			
1	Did the grantee accomplish the grant tasks and deliverables according to the schedule included in the grant agreement for the applicable review period?		
2	If the grantee encountered or anticipated difficulty in meeting the schedule during the applicable review period, did the grantee notify SANDAG in writing? Did the notification include the reason(s) for the delay in performance and the date by which the grantee expected to accomplish deliverables?		
<b>Grant(s) Management</b>			
3	Did the grantee deliver only eligible services pursuant to federal grant requirements and/or the grant agreement? <sup>2</sup>		
4	If the grantee changed its Project Manager, did the grantee notify SANDAG in writing no later than 15 days after the change? <sup>3</sup>		
5	If a Notice to Complete a Recovery Plan was issued, did the grantee implement proposed actions and correct deficiencies within the timeframe stated in the		
6	Were all attempted grant reimbursements during this period allowable as delineated in the Program Management Plan, consistent with 2 CFR Part 200: Uniform Administrative Requirements, Cost Principles, and Audit Requirements? <sup>5</sup>		
7	Did the grantee provide sufficient documentation to support grant expenses and, if indirect costs were included and allowed, were the necessary indirect costs methods used? <sup>5</sup>		
8	Did the grantee provide evidence of a competitive procurement or obtain prior written approval from SANDAG via a Sole Source Justification to use a noncompetitive procurement for each third-party contract over the micro-purchase threshold? <sup>6</sup>		
9	Did the grantee provide adequate matching funds from one or more allowable sources of matching funds? <sup>7</sup>		
10	Are grant documents and accounting records readily accessible and available for review by SANDAG upon request and kept separate from documents not related to the grant? <sup>8</sup>		
11	If a grantee has a third-party contract, are all the necessary funding requirements included on third-party contractor documents and accounting records (e.g. insurance, lobby disclosures etc.)? <sup>8</sup>		
12	Did the grantee comply with the Needs Accommodation Policy? <sup>9</sup>		
<b>Grant(s) Reporting (See Grant Info &amp; Reporting Data Tab)<sup>5</sup></b>			
14	Did the grantee submit reports at least quarterly?		
15	Were sufficient materials including required documentation consistently submitted with reports (at least 80% submitted with all required documentation and free of errors)?		
16	Are required grant photos submitted in a timely manner (at least 95% submitted on time)?		
17	Are required grant reports submitted in a timely manner (at least 95% submitted on time)?		
<b>Grant-funded Vehicle Fleet Management*</b>			
17	Were funds owed to SANDAG related to vehicle purchase(s) submitted in a timely manner (within 90 days)? <sup>10</sup>		
18	Did the grantee adhere the SANDAG logo on each vehicle? <sup>11</sup>		
19	If vehicle(s) were delivered to the grantee, did the grantee complete a road test and submit vehicle photographs, a completed Vehicle Inspection Form, maintenance plan, and delivery date information within two months of delivery? <sup>12</sup>		

20	Did the grantee have a valid written maintenance plan for federally funded facilities and equipment? <sup>6</sup>		
21	Were federally funded facilities/equipment being maintained on time and in accordance with the grantee's maintenance plan? <sup>6</sup>		
23	If vehicle(s) were modified, did the grantee request and receive SANDAG prior approval? <sup>1</sup>		
24	Did the grantee put its vehicle(s) into service within three months of SANDAG notifying the grantee that its vehicle(s) were accepted and could be put into service? <sup>1</sup>		
25	Did the grantee continually operate the vehicle(s) at least 20 hours per week during the period unless a waiver was granted by SANDAG? <sup>1</sup>		
26	If vehicle(s) were candidates for disposition, did the grantee notify SANDAG immediately in the event of an early disposition or within 6 months of the end- of the vehicle(s)' minimum useful life? <sup>1</sup>		
27	If the grantee returned a vehicle to SANDAG prior to the vehicle reaching its minimum useful life, was the reason for the return caused by a force majeure event or otherwise not due to a failure in grantee performance? <sup>1</sup>		
28	If vehicle(s) were placed out of service for more than seven business days, did the grantee notify SANDAG as specified in the grant agreement? <sup>6</sup>		
29	Did the grantee maintain adequate records of vehicle usage including, but not limited to, preventative and routine maintenance, mileage logs, one-way-passenger trip documentation, and damage reports? <sup>6</sup>		
30	If deficiencies were identified during SANDAG vehicle inspections, were these deficiencies resolved within the timeline specified by SANDAG after vehicle inspections? <sup>6</sup>		
Total Applicable Questions		0	
Total Affirmative Responses		0	
Percentage of Affirmative Responses		0.00%	
Score		-3.00	
*Topic not applicable if a grantee does not have capital vehicle grants from Cycle 11 or above.			

#### Citations

- <sup>1</sup> Scope of Performance, Grant Agreement
- <sup>2</sup> Grant Award, Grant Agreement
- <sup>3</sup> Notification of Parties, Grant Agreement
- <sup>4</sup> Performance Monitoring and Compliance, Grant Agreement
- <sup>5</sup> Allowable Costs, Grant Agreement
- <sup>6</sup> Purchases by Subrecipient, Grant Agreement
- <sup>7</sup> Local Match Funds, Grant Agreement
- <sup>8</sup> Records Retention and Audits, Grant Agreement
- <sup>9</sup> Eligible Target Population and Needs Accommodation Policy, 2023 Program
- <sup>10</sup> Section 5310 Vehicle Procurement Schedule, Grant Agreement
- <sup>11</sup> Media and Community Outreach, Grant Agreement
- <sup>12</sup> Pre-Award and Post-delivery Reviews, Grant Agreement

# Monitoring Checklist Score Summary

## 1. Introduction

### A. Grantee and SANDAG Contact Information

Grantee Name: 0

Grantee Contact Name: 0

SANDAG Program Manager Name: 0

Desk Review/Site Visit Date: 1/0/1900

SANDAG Fiscal Year Review Period: 1/0/1900

### B. Grant Agreement Information

Agreement Number(s)	Grant Type*	Funding Source	Cycle Number	Monitoring Period	
1 0	0	0	0	1/0/1900	1/0/1900
2 0	0	0	0	1/0/1900	1/0/1900
3 0	0	0	0	1/0/1900	1/0/1900
4 0	0	0	0	1/0/1900	1/0/1900
5 0	0	0	0	1/0/1900	1/0/1900
6 0	0	0	0	1/0/1900	1/0/1900

## 2. Grantee Compliance (40% of Total Monitoring Score)

Total Affirmative Responses: 0

Total Applicable Questions: 0

Percentage of Affirmative Responses: 0.00%

**Score:** -6.00

## 3. Units of Service (40% of Total Monitoring Score)

Agreement Number	Grant Type	Target Quantity	Actual Units of Service Delivered	Percent Above or Below Target Units	Score
1	0	0	0	0.00%	
2	0	0			
3	0	0			
4	0	0			
5	0	0			
6	0	0			

#### 4. Grant Agreement Compliance (20% of Total Monitoring Score)

Agreement Number	Grant Type	Total Affirmative Responses	Total Applicable Questions	Percentage of Affirmative Responses	Score
1	0	0			
2	0	0			
3	0	0			
4	0	0			
5	0	0			
6	0	0			

#### 5. Summary by Grant and Grant Type

##### A. Summary by Grant

Agreement Number	Grant Type	Score
1	0	0
2	0	0
3	0	0
4	0	0
5	0	0
6	0	0

##### B. Summary by Grant Type

Grant Type	Score
Average of Grantee Contract Transportation Service and Operating Grants	
Average of Grantee Mobility Management Grants	
Average of Grantee Vehicle and Other Equipment Capital Grants	

#### 6. Review and Signatures

By signing below, I confirm that I have received and reviewed this completed Monitoring Checklist.

\_\_\_\_\_  
Grantee Project Manager (Print)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Grantee Project Manager (Signature)

\_\_\_\_\_  
Date

### 3. Grant Agreement Compliance

This indicator assesses the extent to which an STGP grantee complies with requirements specific to its STGP grant agreement(s). This indicator includes, but is not limited to, the following topics: Scope of Work compliance, Grant reporting, Allowable Costs, Needs Accommodation Policy.

Column Letter	Column Header Name	Specific Instructions (If Applicable)
A	#	
B	Question	
C	Response	
D	Notes (e.g., if any response is N/A)	
E	SANDAG Source Evidence (Not for Print)	SharePoint File Link

### Total Score & Signatures

This section totals all the scores based on affirmative responses or units. Not Applicable answers are not counted toward or against grantees. Section I supplies a grantee compliance score which creates a total score for one grantee across any grant type that is counted once. Sections II and III scores grant agreements of the same grant type individually and then averages based on the total of the same grant type they had active during the monitoring period. Sections II and III are then weighted evenly to create a score based on grant agreement type. Total score(s) range from -15-+5. These points may be added to an applicant's STGP Call for Projects application score.

### VLOOKUP Not for Print

This formula page contains the score weighting and scores based on total affirmative responses or unit quantities. This is not for print.



# Specialized Transportation Grant Program

Cycle 13 Call for Projects Funding Recommendations

Transportation Committee | Item 5  
Jenny Russo, Grants Program Manager, and Aly Vazquez, Associate Grants Program Analyst  
Friday, June 6, 2025

## Specialized Transportation Grant Program Overview

### Description:

Funds projects and programs in the San Diego region that expand mobility options for older adults and individuals with disabilities when fixed-route public transit is insufficient, unavailable, or inappropriate.

### Funding Sources:

- Federal Transit Administration Section 5310 (Section 5310) program
- TransNet Senior Mini-Grant (SMG) program

### Distribution Frequency:

Call for Projects held about every two years



# Program Goal

*To improve mobility for older adults and individuals with disabilities*

3

## STGP 13 Call for Projects

### Section 5310

- Operating, Mobility Management, and Capital
- 65+ and individuals with disabilities
- Large, urbanized area of San Diego County (SANDAG)
- Formula funds
- **\$6.6M** available
- Minimum: \$50K and Maximum: \$1.2M
- Competition not required
- BOD can deviate from the funding recommendations

### Senior Mini-Grant

- Operating, Mobility Management
- 60+
- San Diego County
- Local sales tax revenue
- **\$2.8M** available
- Minimum: \$50K and Maximum: \$1M
- Competitive Requirements
- BOD can fund based on consistency with the approved call for projects criteria

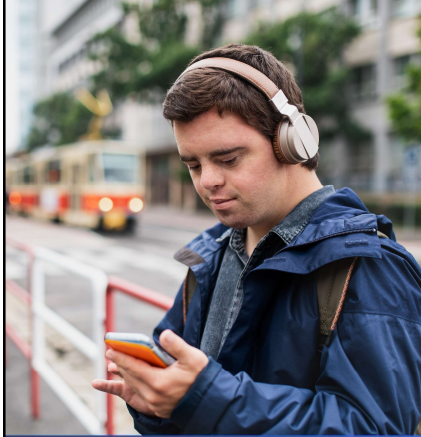
## STGP Cycle 13 Call for Projects Process



## Previously Approved Evaluation Criteria

No.	Criteria Category	Points Possible
1.	Applicant Experience, Capacity, and Readiness	15
2.	Need and Equity	20
3.	Operational/Implementation Plan	10
4.	Stewardship of Public Funds	15
5.	Coordination and Outreach	10
6.	Environmental Responsibility	5
7.	Proposed Performance Measures	10
8.	Performance Monitoring and Outcomes	15
	<b>Subtotal</b>	<b>100</b>
9.	Past Performance Adjustment	-15 to +5
	<b>Total</b>	<b>85 to 105</b>

## Evaluators



Personal Experience



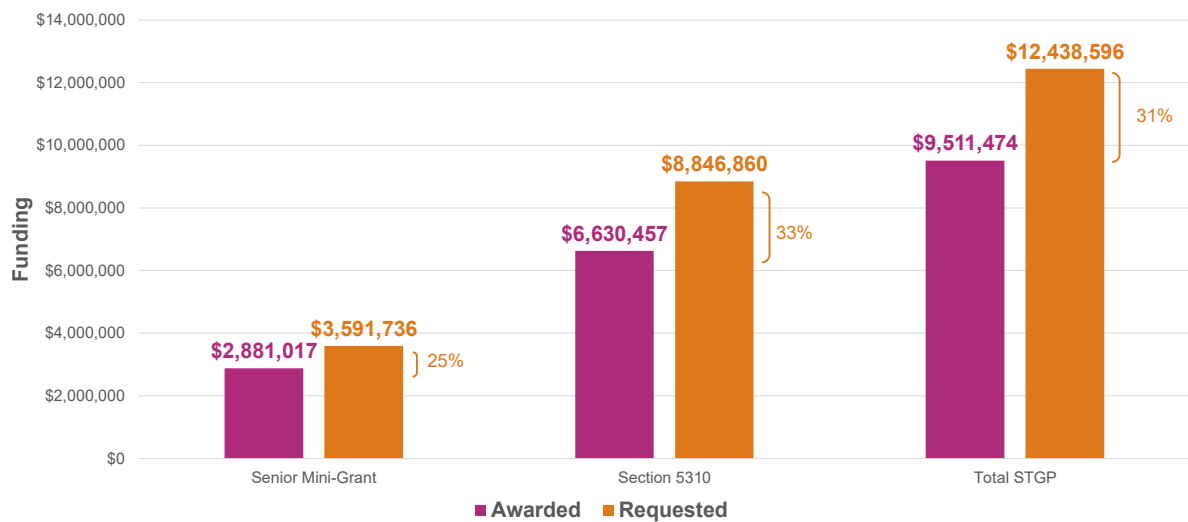
Grant Writing



Caregiving

SANDAG | 7

## Cycle 13 Requests



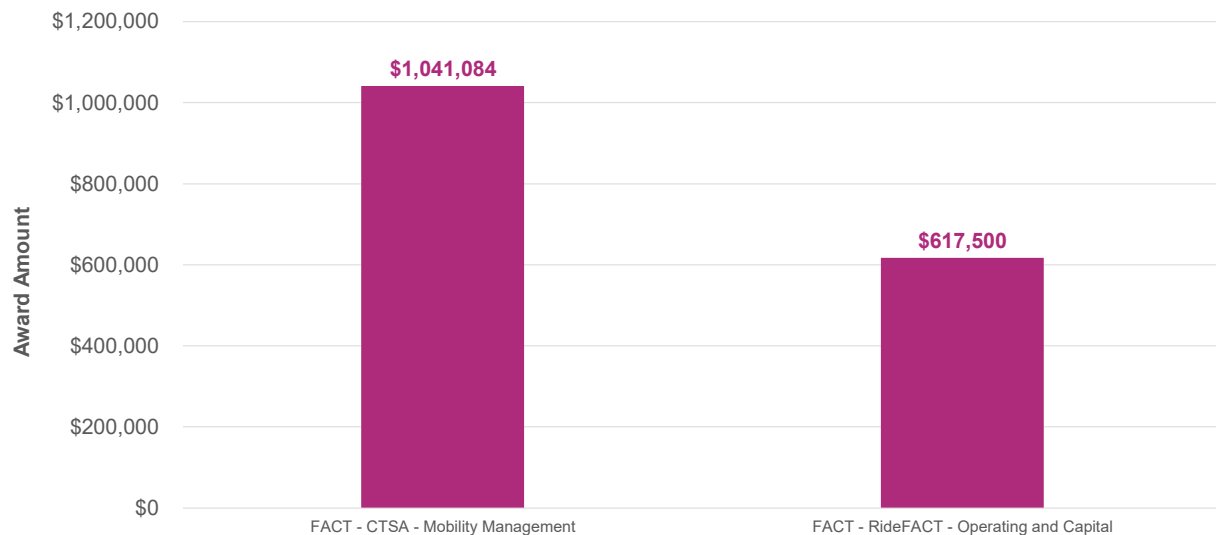
SANDAG | 8

## SMG Funding Recommendations



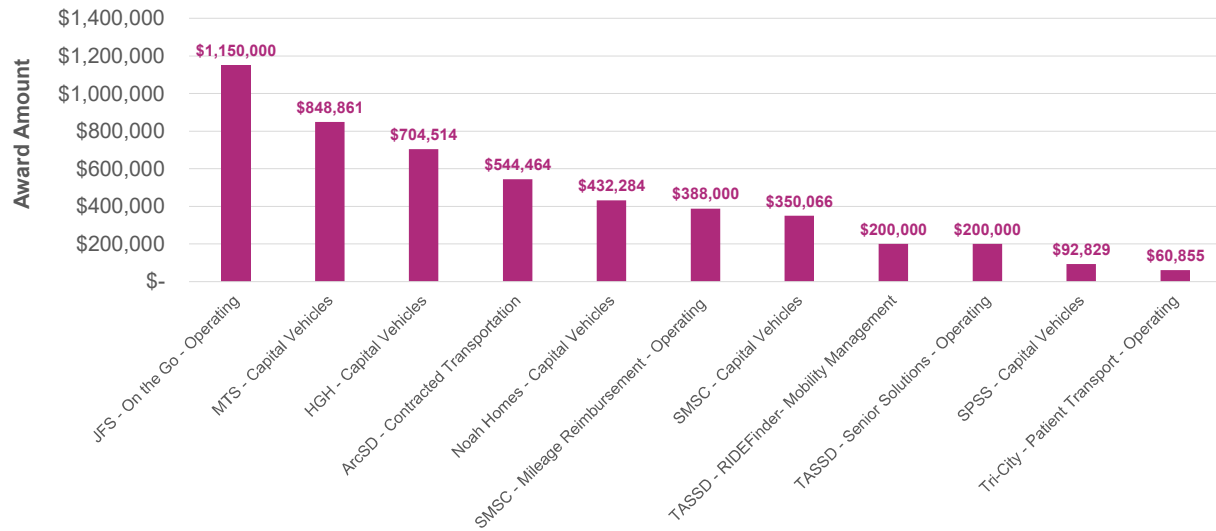
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## BOD Approved FACT Section 5310 Sole Source



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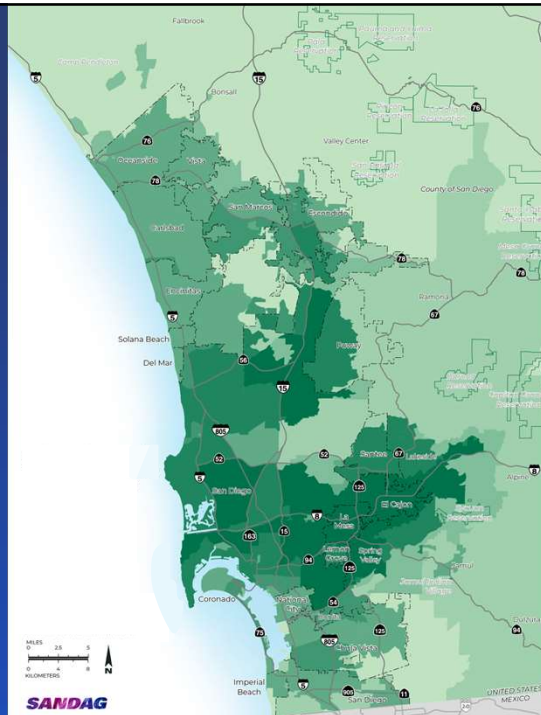
## Section 5310 Funding Recommendations



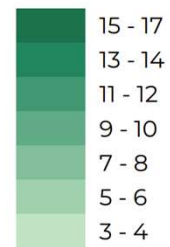
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## STGP Funding Recommendations Service Areas Map

Rural Section 5310 funding is administered by Caltrans

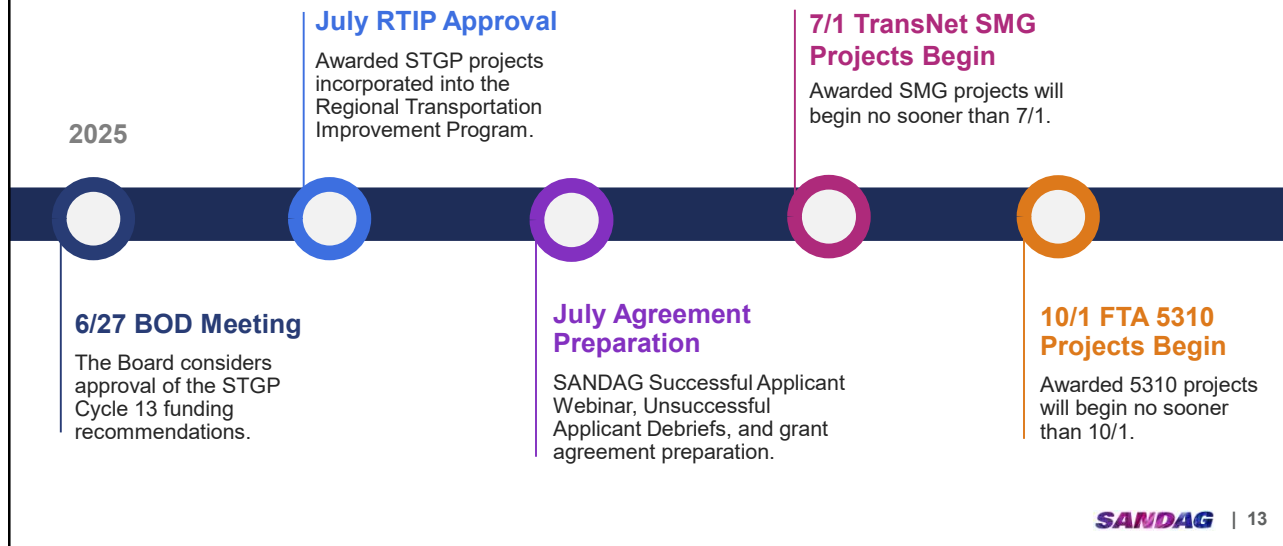


### Number of Projects



SANDAG | 12

## Next Steps



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**SANDAG**

June 6, 2025

## San Diego Regional Vehicle Miles Traveled Mitigation Program

### Overview

California Senate Bill (SB) 743 (Steinberg, 2013), also known as the Vehicle Miles Traveled (VMT) Policy, became effective on July 1, 2020. The bill requires local agencies to use VMT to assess the environmental impacts of land development projects on the transportation system. SANDAG and the County of San Diego have received a Caltrans Strategic Partnership Grant to explore the development of a Regional VMT Mitigation program for the San Diego Region. The program will strive to develop an equitable and feasible path forward for new developments to mitigate their VMT related impacts through a regional program-based on regional infrastructure needs. Staff from the County of San Diego will provide a report on the status of the project.

### Action: Discussion

SANDAG and County of San Diego staff will provide an update on the status of the Regional Vehicle Miles Traveled Mitigation program.

### Fiscal Impact:

The project is part of SANDAG's FY 2025 Budget and Overall Work Program funded through a Caltrans Planning Grant.

### Schedule/Scope Impact:

The project is expected to be completed in June 2026.

### Key Considerations

- Under SB 743, the State of California has indicated that VMT is the appropriate metric to evaluate transportation impacts under CEQA.
- The VMT metric has created challenges for development within small suburban jurisdictions and rural areas as they attempt to feasibly mitigate their impacts based on localized improvements.
- The San Diego Regional VMT Mitigation Program will help to evaluate opportunities for VMT mitigation that are most compatible with the needs and priorities of the San Diego region.
- A Technical Advisory Committee (TAC) was formed for the project that includes transportation engineers and CEQA planners from jurisdictions within the San Diego Region (Attachment 1).
- Seven program evaluation criteria were developed with the TAC and four Primary Program Options were analyzed against the evaluation criteria.
- The Hybrid Program Option, which provides VMT mitigation opportunities at both the regional and local levels, scored highest on the evaluation criteria and was selected as the preferred program option (Attachment 2).
- The preferred program option being developed would be voluntary, with participation being left to the discretion of the local jurisdiction as the CEQA lead agency.

### Next Steps

A Draft VMT Mitigation Program will be developed around the preferred program option and brought to the Transportation and Regional Planning Committees for input at future meetings.

### ***Antoinette Meier, Senior Director of Regional Planning***

- Attachments: 1. Regional VMT Mitigation Program Technical Advisory Committee members  
2. San Diego Regional VMT Mitigation Program – Preferred Option Section Memo dated March 26, 2025



**San Diego Region VMT Mitigation Program  
Technical Advisory Committee Roster**

<b>Jurisdiction</b>	<b>TAC Member(s)</b>	<b>Have Program</b>
Caltrans District 11 (Grant Agency)	Omar Flores, Rangel (Rodger) Sanchez, Kim Dodson, Chris Schmidt	No
SANDAG (Applicant)	Kirsten Uchitel	No
County of San Diego (Applicant)	Jacob Armstrong & Damon Davis	No
City of Carlsbad	Eric Lardy, Jason Geldert, Tim Carroll, Nathan Schmidt	Pending
City of Chula Vista	Scott Barker	Pending?
City of Coronado	Rich Grunow	No
City of Del Mar	TBD	No
City of El Cajon	Mario Sanchez & Raul Armenta	No
City of Encinitas	Matthew Edgeworth, Abraham Bandegan, Evan Jedynak	Pending?
City of Escondido	Craig Williams	Exchange
City of Imperial Beach	Reyna Ayala (John Collins??)	No
City of La Mesa	Lynnette Santos	No
City of Lemon Grove	Ed Walton	No
City of National City	Steve Manganiello	No
City of Oceanside	Teala Cotter, Sergio Modera	No
City of Poway	Tracy Beach (John Colins?)	No
City of San Diego	Heide Vonblum	In-Lieu Fee
City of San Marcos	Kyrenne Chua, Eddmond Alberto, Stephanie Kellar, Bradley Holder, Macey Winter, Saima Qureshy	No
City of Santee	Minjie Mie, Sandy Sawa, Jeff Morgan	No
City of Solana Beach	Mo Sammak & Joseph Lim	DIF Program
City of Vista	Husam Hasenin	No
Metropolitan Transit System	Denis Desmond	No
North County Transit Authority	Katie Persons	No
Port of San Diego	Lesley Nishihira, Dennis Campbell	No
San Diego County Water Authority	???	No
San Diego Regional Airport Authority	Knack Sjohnna	No
Office of Planning and Research	Chirs Bjornstad	N/A
Berkeley Law	Ted Lamm	N/A





## MEMORANDUM

**To:** Jacob Armstrong, County; Kirsten Uchitel, SANDAG; Damon Davis, County  
**From:** Stephen Cook, TE, Intersecting Metrics  
**Date:** March 26, 2025  
**Regarding:** **San Diego Regional VMT Mitigation Program – Preferred Option Section**

### 1.0 Purpose & Intro

The purpose of this memorandum (memo) is to document the process and analysis used to select the Preferred Program Option for the San Diego Regional VMT Mitigation Program.

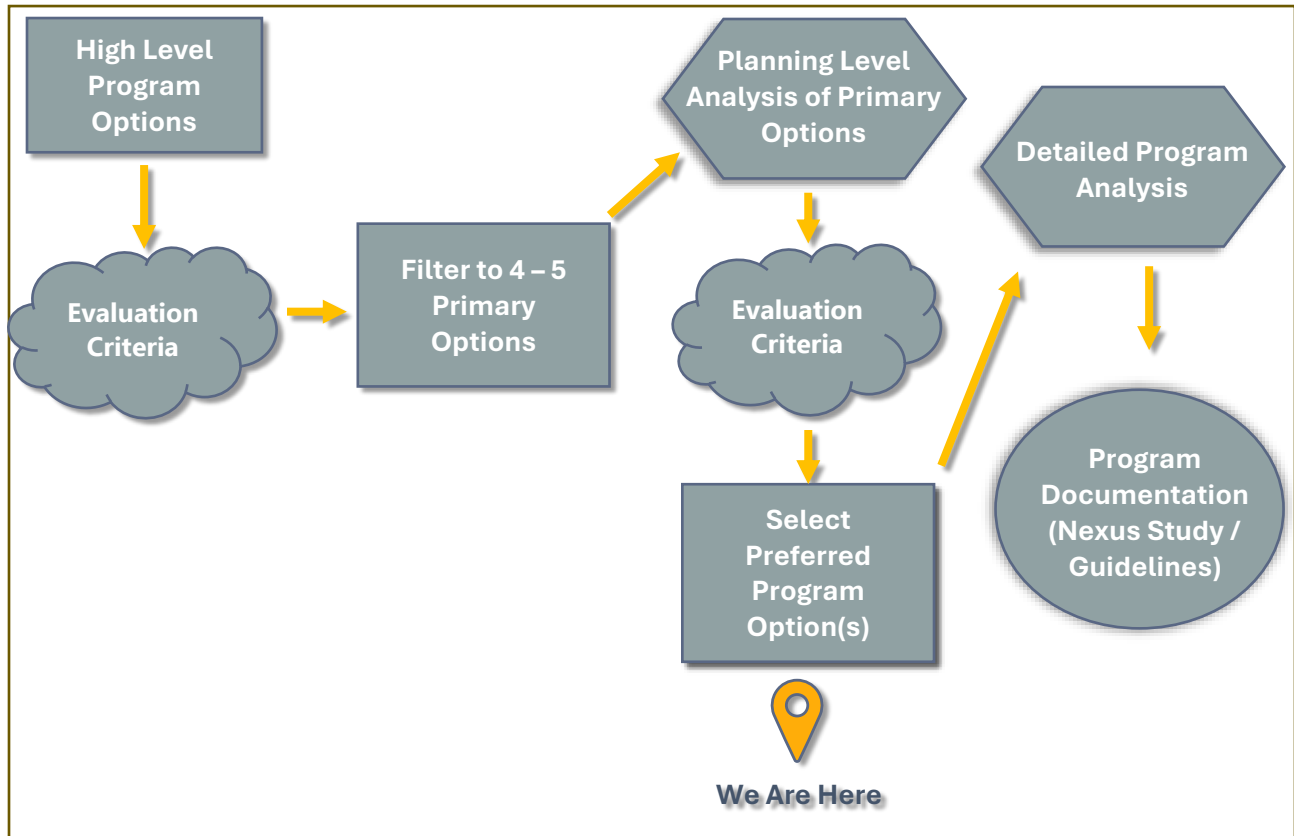
#### Program Description

In 2023, the San Diego Association of Governments (SANDAG) and the County of San Deigo (County) jointly applied for a Caltrans Sustainable Transportation Planning Grant to develop a Regional Vehicle Miles Traveled (VMT) Mitigation Program (Program) for the San Diego Region. The main Program goal is to provide an equitable and feasible path forward for new development to mitigate VMT related impacts by the use of regional resources and infrastructure. The Program will also look to provide jurisdictions within the San Diego Region a comprehensive set of resources and VMT mitigation tools and programs, in which they can choose to participate in, adopt, and/or build from to create their own local programs to help mitigate local impacts.

While the program will be developed by SANDAG and the County, the project team will seek input and direction from a Technical Advisory Committee (TAC) throughout the development process. The TAC is comprised of Transportation Engineers and CEQA Planners from jurisdictions within the San Diego Region. The goal of the TAC is to help ensure that the Program will be usable and applicable for all jurisdictions within the region, to coordinate on current local issues and experiences, and finally, to provide a peer review of the program development and documents. A detailed scope of work for the Program is included in **Attachment 1**.

### 2.0 Program Development and Evaluation Process Overview

**Figure 1** provides an outline of the process used to develop, select, and refine the Preferred Program Option. Eight High-Level Program Options were initially developed by the project team and presented to the TAC. The TAC then voted to refine the eight Hight-Level Program Options, based on how well they fit within the Program's evaluation criteria established within the grant, to four Primary Options. A planning level assessment was conducted for each of the four Primary Options to provide more information and score how each Primary Option compared against the Program's evaluation criteria. Finally, the option with the highest score was selected as the Preferred Program Option. The following sections provide additional detail on the overall process, and provide a summary of the analyses used for each step of the evaluation process.



**Figure 1: Program Evaluation Process**

### 3.0 Developing the High-Level Program Options

The first step in developing the High-Level Program Options was to identify a wide range of VMT reduction program components and features that could be combined to create the Program. Potential program components and features were identified based on similar VMT mitigation programs implemented by peer jurisdictions, input from TAC members, theoretical program concepts established through white papers, as well as innovative ideas based on the project team’s professional experience in VMT analyses, CEQA, and the Mitigation Fee Act.

**Attachment 2** displays all of the potential program components and features that were considered in developing the High-Level Program Options. The table organizes the components and features that would be implemented at a regional level or a local level, and identifies the applicable, general VMT reduction program classification. Finally, a brief description of the components and features is provided, including the potential pros and cons that would be associated with each type of Program.

To create a series of High-Level Program Options, the project team combined different VMT Mitigation program components and features, from Attachment 2, that complement each other, to create a comprehensive program option. Different options were created to create a wide spectrum of alternatives, ranging from regionally focused programs to locally focused programs, as well as a hybrid of both. Different options also focused on the development of expensive and complex programs, to less costly and simple programs. In total, eight High-Level Program options were developed. Detailed descriptions of each High-Level Program Options presented to the TAC are provided in **Attachment 3**.



## 4.0 Evaluation Criteria

The Caltrans Sustainable Transportation Grant that helped to establish the development of the Regional VMT Mitigation Program requires, at a minimum, that the following evaluation criteria should be used to select and develop a program option:

### Legal Requirements:

- Will the timing of infrastructure implemented through the Program meet CEQA requirements?
- Ability of the Program to establish an “essential nexus” between the infrastructure/mitigation measures and new development.
- Ability of the Program to meet the California Mitigation Fee Act stipulations on establishing the “purpose and use” of the mitigation fee.
- Ability to meet California Assembly Bill 602 outlines consistency requirements with the fee Program and nexus.

### Quantification:

- Ability to quantify the VMT reductions associated with the infrastructure included within the Program.
- Can regionally recognized documents such as the CAPCOA GHG Handbook and the SANDAG TDM tool be used as resources to quantify the VMT reductions associated with the Program?
- Will any additional research or analysis be required to qualify the Program reductions?

### Total VMT Reduction Potential<sup>1</sup>:

- The total potential VMT reductions that could be associated through the Program.
- The feasibility that the total reductions will be achieved through the life of the Program.

### Cost Effectiveness and Affordability:

- The relative cost of mitigation as compared to the value created by permitting projects with additional VMT generation.
- Program mitigation costs must be low enough for projects and participating entities to participate, while also generating enough funds to pay for necessary mitigation projects.

### Additionality:

- The ability of the Program to separate VMT reductions would not otherwise have been realized if not for the funds committed.
- VMT reductions are not double counted via the model and baseline and cumulative VMT analyses.

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<sup>1</sup> A seventh evaluation criteria was added during the planning level analysis of the Primary Options, that was not initially included in the Grant. It was noticed during the analysis that there were no criteria that evaluates the overall total VMT reduction that could potentially be associated with the program. The total potential VMT reduction associated with a program option is a critical factor as it will extend the effectiveness of the program overtime, provide more opportunities for development to mitigate their impacts, and result in a more sustainable environment for the region.



### Geographic Scope and Fit:

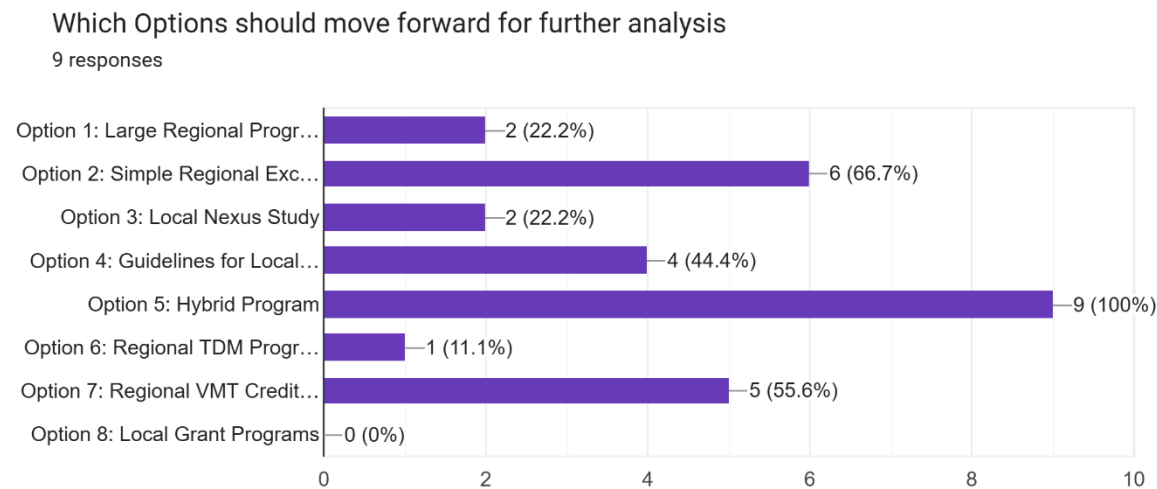
- The appropriateness of the proposed Program to be applied throughout the San Diego region.

### Equity:

- Means to facilitate disadvantaged communities receiving their fair share of Program benefits, while also reducing disproportionate impacts.

## 5.0 Selecting the Primary Options

The eight High-Level Program Options discussed in Section 3.0 were presented and voted on at the third TAC Meeting in December 2024. **Figure 2** displays the voting results from the TAC.



**Figure 2: TAC Voting Results to select the Primary Options**

As shown in Figure 2, the TAC selected the following four Primary Options to move forward with for a planning level analysis, and to be compared against the evaluation criteria outlined in Section 3.0:

### Option 2: Simple Regional Exchange Program

SANDAG and/or the County will develop a regional database where jurisdictions can post shovel ready VMT reducing infrastructure projects for new development to construct to offset VMT related impacts. Under this option, jurisdictions will be responsible for calculating the associated VMT reductions, permitting and inspecting the infrastructure, as well as working with the lead CEQA agency on recognition, tracking, and monitoring the mitigation. Jurisdictions will also have the choice of participating in the program, both in posting shovel ready VMT reducing infrastructure projects to the database, as well as allowing new development within their jurisdiction to construct VMT reducing infrastructure in other jurisdictions to offset their VMT related impacts. Under this option, minimal regional oversight will be provided. The main purpose of the program will be to provide a tool that enhances the communication between the jurisdictions and new development.

### Option 4: Guidelines for Local Programs

Develop guidelines that assist jurisdictions in developing both a VMT Credit / Mitigation Bank Program and a VMT Exchange Program at the local level. The guidelines will identify the process to set up the program, the legal requirements and documentation needed, as well as the resources, calculations, and methods that should be used in developing the program.



### **Option 5: Hybrid Program**

This alternative combines three different components and provides VMT mitigation options at both the regional and local levels. Regional mitigation opportunities will be provided through both a regional VMT exchange program and a regional VMT credit program. Both programs will be implemented and monitored by SANDAG and/or the County. Jurisdictions will have the option to participate in both programs. To provide local VMT mitigation options, the program will develop guidelines and resources to assist jurisdictions in developing and implementing a local in-lieu fee program. The goal of this program alternative is to provide a wide and flexible list of VMT mitigation options, at both the regional and local levels, to allow new development to have multiple avenues to mitigate VMT related impacts. Each component of the program is described below:

*Regional Exchange Program:* SANDAG and/or the County will develop and maintain a regional database of shovel ready VMT reducing infrastructure projects, submitted by jurisdictions, for new development to construct to offset their impacts. Jurisdictions would be responsible for posting projects and their associated construction costs, while the regional exchange program would calculate the associated VMT reductions. VMT reductions would be calculated based on a set of agreed upon guidelines that are developed as part of the program. SANDAG and/or the County will maintain the database, with oversight from a regional body, such as the Mobility Working Group. *Note: This exchange program is intended to be more comprehensive than the simple regional VMT exchange program option (Option 2).*

*Regional Credit Program:* SANDAG and/or the County will develop and maintain a regional VMT credit program, where jurisdictions can submit recently constructed VMT reducing infrastructure that is eligible to receive VMT reduction credits. The credits can then be sold to new development to offset VMT related impacts. Credit values will be issued based on a standard regional cost to reduce VMT. VMT reductions will be evaluated based on set guidelines that are developed as part of the program. The program will also evaluate the potential for overlapping VMT credits and/or assuming credit for VMT reductions that would have happened without the program (i.e. additionality). SANDAG and/or the County will be responsible for maintaining the program, with oversight from a regional body, such as the Mobility Working Group.

*Local In-Lieu Fee Nexus Study:* The program will develop a nexus study that determines the cost to reduce one-mile of VMT through the development of infrastructure within the region. Due to the size of the region, the cost to reduce one-mile of travel may need to be broken into sub-regions. Program guidelines will also be developed to identify how the revenue from the fee program would need to be allocated and tracked to maintain compliance with both CEQA requirements and the Mitigation Fee Act. Using these resources, jurisdictions will have the option to develop, implement, and maintain their own local in-lieu fee program.

### **Option 7: Regional VMT Credit Program Based on the Regional Transportation Plan**

Develop a Regional VMT Credit Program based on the implementation of VMT reducing infrastructure included in SANDAG's Regional Transportation Plan (RTP). As infrastructure included in the RTP is implemented, SANDAG can develop and sell the VMT related credits to developments to offset their impacts. The revenue generated from the program would then be used to fund more RTP infrastructure.



## 6.0 Primary Program Option Analysis

A planning level analysis was conducted for each of the primary options. The analysis focused on how well each option compared against the evaluation criteria outlined in Section 3.0. The analysis assigned a score between 1 and 5 (1 being the lowest and 5 being the highest) for each evaluation criteria (see Section 4.0) under each Primary Program Option. **Table 1** displays the result of the analysis and the total scores for each Primary Program Option. The full analysis of each Primary Program Options is provided in **Attachment 4**.

**Table 1: Primary Program Option Analysis Summary**

Option	Legal Requirements	Ability to Quantify VMT Reductions	Total VMT Reductions	Cost Effectiveness and Affordability	Additionality	Geographic Scope and Fit	Equity	Total
Simple Regional Exchange Program	4	2	2	3	5	2	1	<b>19</b>
Guidelines for Local Programs	3	2	3	3	3	5	3	<b>22</b>
Hybrid Program	4	4	4	5	3	5	2	<b>27</b>
Regional VMT Credit Based on RTP	4	5	5	2	1	2	1	<b>20</b>

As shown in Table 1, the Hybrid Program Option scored the highest overall score, and was by far the most consistent with the evaluation criteria. As such, it is selected as the Preferred Program Option.

## 7.0 Next Steps

The Primary Program Option analysis result will be presented at the fourth TAC meeting, which is tentatively scheduled to be held in April 2025. At the meeting, TAC members will be able to provide comments on the analysis and feedback on the Preferred Program Option. If the TAC is comfortable with the analysis results, the Project Team will move forward with developing the Draft Program based on the Hybrid Program Option.



# Attachment 1

## Full Scope of Work

### Task 01: Project Administration

#### Kick-off Meeting with Caltrans

The County, with support from SANDAG, will hold a kick-off meeting with Caltrans to confirm the scope of work, discuss any needed modifications, identify key issues, and review Caltrans contracting procedures.

#### Ongoing Project Management

The County, with support from SANDAG, will prepare quarterly invoices and progress reports in accordance with the Caltrans contract requirements. As part of this task, The County will lead, with support from SANDAG, weekly or bi-weekly check-in calls, as needed, with the consultant team. SANDAG, with support from the County, will submit regular required progress reports to Caltrans.

Task Deliverables
<ul style="list-style-type: none"><li>▪ Kick-Off Meeting with Caltrans - Meeting agenda and notes</li><li>▪ Check-in Calls – Meeting agendas, notes, and action items</li><li>▪ Quarterly Invoices</li><li>▪ Progress Reports</li></ul>

### Task 02: Consultant Procurement

#### Request for Proposals

The County, with support from SANDAG will prepare a Request for Proposals (RFP), to be released and circulated, following all relevant procurement procedures, by the County, to secure a consultant. All activities will be consistent with state and federal requirements, Local Assistance Procedures Manual for procuring non-Architectural and Engineering consultants, the Grant Application Guide, Regional Planning Handbook, and the executed grant contract with Caltrans.

Task Deliverables
<ul style="list-style-type: none"><li>▪ Request for Proposals and associated documents</li><li>▪ Consultant Agreement</li></ul>

### Task 1: Technical Advisory Committee and Public Outreach

#### TAC Formation

The County, SANDAG, and the selected consultant team (Project Team) will establish a Technical Advisory Committee (TAC) to advise on policy decisions for a VMT Mitigation Program.

The TAC will comprise interested representatives from:

- SANDAG Member Agencies
- MTS/NCTD



- Caltrans District 11

The County, SANDAG, and the consultant team will hold a kick-off meeting with the TAC at the outset of the project to introduce the project objectives and scope of work and to seek feedback on the key issues the VMT Mitigation Program should address.

### **Outreach Plan**

The Project Team will prepare an Outreach Plan outlining stakeholder and interested community member engagement and feedback opportunities. The Outreach Plan will identify methods for engagement with all of the region's demographics and will leverage a range of outreach strategies including in person meetings (per current COVID-19 protocols, as outlined by the State of California and the CDC). Virtual meeting options will also be available for members and interested parties unable to attend meetings in person, as well as online engagement through an interactive project webpage. Public meetings will be recorded and made available on the project website. Meeting materials including presentations will also be posted on the project webpage.

The Outreach Plan will specify ways to involve each of these stakeholder groups at appropriate times throughout the project, from project kick-off through conclusion. Individual or group stakeholder interviews will be conducted at the beginning of the process to allow the Project Team to gain a better understanding of the issues and needs unique to each stakeholder. Follow up interviews will be conducted upon release of the Draft Outreach Plan, affording the Project Team direct feedback from project stakeholders.

### **TAC Meetings**

The Project Team will convene up to six (6) TAC meetings to advise on policy decisions for a potential Regional VMT Mitigation Program at key milestones including but not limited to:

- VMT Framework Mitigation evaluation criteria and refinement
- VMT Framework Mitigation evaluation criteria refinement
- VMT Framework Mitigation preliminary program selection
- Draft Regional VMT Mitigation Program Report and Nexus Study
- Review of feedback on Public Review Drafts of the Program Report and Nexus Study and TAC refinements for integration into Administrative Drafts of the Program Report and Nexus Study.

<b>Task Deliverables</b>
<ul style="list-style-type: none"><li>▪ Outreach Plan</li><li>▪ Publish Interactive Project Webpage</li><li>▪ Maintain Interactive Project Webpage (project updates, materials, etc.)</li><li>▪ TAC Meeting Materials and Summaries</li><li>▪ Stakeholder interviews and Summaries</li></ul>



### **Task 2: Regional VMT Mitigation Framework Evaluation Criteria**

Develop and evaluate Program criteria using existing literature and resources to satisfy requirements necessary to qualify the proposed Program as a permissible mitigation measure under the California Environmental Quality Act (CEQA). The UC Berkeley ITS Report, 'Implementing SB 743: An Analysis of Vehicle Miles Traveled Banking and Exchange Frameworks', published in October 2018, will be used as a





resource to establish the Program criteria. The Project Team will coordinate with the UC Berkeley team to ensure any updates to the Report are integrated into the Program criteria.

Task 2 will ensure that the proposed VMT Exchange/Bank program constitutes a 'public facility' as defined by California Code Section §66000(d) and demonstrates a reasonable relationship between the Program and the need for a 'public facility' to include 'public improvements. Furthermore, it will ensure full cost is guaranteed and that 'additionality' (the VMT exchange/bank is funding mitigation that is not already committed) potential is eliminated. An evaluation as to whether the Program will satisfy all requirements of the Mitigation Fee Act, as well as AB 602 will be conducted. The criteria will demonstrate an essential nexus between the current condition being addressed and any adverse impact of the project. The criteria will also assess how the Program will may be applied throughout the San Diego region and benefit disadvantaged and VMT-impacted communities.

### **Literature Review of VMT Mitigation Programs**

The consultant team will conduct an extensive literature review of existing and proposed VMT Mitigation Fee, Exchange, and Bank Programs. This review will also include conducting interviews with peer jurisdictions who have implemented, or are in the process of implementing, VMT mitigation programs.

### **Develop Evaluation Criteria**

The Project Team will develop a series of criteria to evaluate potential VMT Mitigation Framework options. At a minimum, these criteria will address:

- **Legal Requirements:**
  - CEQA requirements including establishment of an "essential nexus" between the mitigation fee and government interest.
  - California Mitigation Fee Act stipulations on establishing the "purpose and use" of the mitigation fee.
  - California Assembly Bill 602 outlines consistency requirements with the fee program and nexus.
- **Quantification.** Quantify the VMT reductions anticipated through the infrastructure implementation included within the fee program. The VMT analysis conducted for 2021 Regional Plan contains much of these calculations and will be used as a primary source for this effort.
- **Cost Effectiveness and Affordability.** The relative cost of mitigation as compared to the value created by permitting projects with additional VMT generation. Program mitigation costs must be low enough for projects and participating entities to participate, while also generating enough funds to pay for necessary mitigation projects.
- **Additionality.** The principle that VMT reductions would not otherwise have been realized if not for the funds committed.
- **Geographic Scope and Fit.** The appropriateness of the proposed Program to be applied throughout the San Diego region.



- **Equity.** Means to facilitate disadvantaged communities receiving their fair share of Program benefits, while also reducing disproportionate impacts.

Task Deliverables
<ul style="list-style-type: none"><li>▪ Evaluation Criteria</li></ul>

### Task 3: Regional VMT Mitigation Program Options

#### Develop, Evaluate, and Select Regional VMT Mitigation Framework Options

The Project Team will develop at least four (4) VMT Mitigation Framework model options, including a mitigation fee model, mitigation bank model, mitigation exchange program model, and a hybrid of two or more models. Each of these options will be described in detail and evaluated under the criteria developed in Task 2. In particular, the options will describe:

- How project's with VMT related impacts participate in the Program.
- How participating entities incorporate the Program into their CEQA review and approval process for projects.
- The mitigation mechanism(s) included in the Program.
- Anticipated total fee collection.
- Regional VMT reducing infrastructure funded through the Program.
- How a portion of the fees collected through the Program could be used or distributed to participating entities to implement local improvements.

#### Evaluate Regional VMT Mitigation Framework Options

The Project Team will assess the options using the evaluation criteria developed in Task 2.

Task Deliverables
<ul style="list-style-type: none"><li>▪ Regional VMT Mitigation Program Options (at least 4)</li><li>▪ Regional VMT Mitigation Program Options Evaluation</li><li>▪ Regional VMT Mitigation Program Preliminary Option Recommendations</li></ul>

### Task 4: Draft Regional VMT Mitigation Program

#### Draft Regional VMT Mitigation Program Report

Based on the results of the previous Tasks, the Project Team will prepare a Draft Regional VMT Mitigation Program Report (Draft Program Report) that incorporates feedback from the TAC and stakeholder needs. The Draft Program Report will describe how the Program will be administered, monitored, tracked, and mechanisms for reporting. It will also outline how the Program will meet the legal requirements documented in Task 2, describe the criteria used to evaluate and prioritize mitigation projects, mechanisms to adjust VMT pricing as needed to facilitate participation or address market changes, and strategies the Program will employ for equitable distribution of implementation projects or funding.



### **Draft Regional VMT Mitigation Program Nexus Study**

Based on the Program criteria and guidance from the TAC, the Project Team will prepare a Draft Nexus Study to document the technical justification of the impacts associated with new projects within the region to the fees that will be collected and administered through the Regional VMT Mitigation Program. This analysis will evaluate the nexus of the proposed Program and address the “essential nexus” clause required by CEQA and consistency with the Mitigation Fee Act. This Task will also include estimating VMT benefits of the selected program option and providing substantiating evidence of mitigation of projected impacts as required by CEQA.

### **Public Review Draft Documents**

The consultant team will incorporate the feedback from the TAC into the Draft VMT Mitigation Program Report and Draft Nexus Study.

### **Stakeholder Review**

Following the steps outlined in the Outreach Plan, the Project Team will circulate the Draft VMT Mitigation Program Report and Draft Nexus Study for stakeholder review and feedback. Following the conclusion of the outreach program, the consultant will prepare a memorandum that summarizes the public feedback on the Draft VMT Mitigation Program.

### **Administrative Draft Regional VMT Mitigation Program Report and Nexus Study**

Based on the feedback received during the Draft Regional VMT Mitigation Program Report and Nexus Study public review, Administrative Drafts of the Regional VMT Mitigation Program Report and Nexus Study will be prepared for approval.

<b>Task Deliverables</b>
<ul style="list-style-type: none"><li>▪ Draft Regional VMT Mitigation Program Report</li><li>▪ Draft Regional VMT Mitigation Program Nexus Study</li><li>▪ Regional VMT Mitigation Program Stakeholder Outreach Summary</li><li>▪ Administrative Draft Regional VMT Mitigation Program Report</li><li>▪ Administrative Draft Regional VMT Mitigation Program Nexus Study</li></ul>

## **Task 5: Finalize VMT Mitigation Program and Approval**

### **Regional VMT Mitigation Program Sample Fee Ordinance**

The Project Team will develop a draft ordinance that documents the requirements and process of the Regional VMT Mitigation Program for the County and SANDAG. Participating entities may wish to adopt the ordinance, or similar, to implement a local Program.

### **City Council and other Board Meeting Presentations**

The Project Team will coordinate with the TAC and stakeholders to promote the Program and provide presentations (up to XX) to City Council, Board, Commission, or other participating entity meetings to provide information on the proposed final San Diego Regional VMT Mitigation Program.



### **Regional VMT Mitigation Program Approval**

The Project Team will present the final Regional VMT Mitigation Program, integrating feedback received through City Council and other Board Meetings, to the SANDAG Board of Directors and the County Board of Supervisors for approval as a resource and possible VMT mitigation tool.

### **Final San Diego Regional VMT Mitigation Program**

The VMT Mitigation Program comprises the Report and Nexus Study, which will be finalized based on feedback and changes from the SANDAG Board of Directors and the County Board of Supervisors. The Sample Fee Program Ordinance will also be finalized.

<b>Task Deliverables</b>
<ul style="list-style-type: none"><li>▪ Sample Fee Program Ordinance</li><li>▪ Summary of Participating Entities' Engagement, Meeting Materials, and Feedback</li><li>▪ SANDAG Board of Directors meeting materials</li><li>▪ County Board of Supervisors meeting materials</li><li>▪ Final Regional VMT Mitigation Program Report</li><li>▪ Final Regional VMT Mitigation Program Nexus Study</li></ul>



### **Next Steps – Program Implementation**

Upon approval of the Regional VMT Mitigation Program, future efforts may include ongoing coordination among the Project Team (with or without consultant support per the RFP), adopt Fee Program Ordinance, continue discussions with participating entities regarding local and regional implementation, outline methods for establishing project accounts and procedures for fee collection and distribution, develop outreach materials and methods for disseminating Program information, which includes updating the interactive project website, and establish schedule for evaluating and updating the Ordinance.



## Attachment 2

# High-Level Program Options

### Regional vs Local Programs

VMT mitigation programs can be implemented and administered at a regional level by either the Metropolitan Planning Organization (MPO) or Regional Transportation Planning Agency (RTPA), which SANDAG represents both in the San Diego Region, or the programs can be implemented at a local level by the individual jurisdictions. Implementing programs at both levels have significant benefits and drawbacks; thus, deciding if the VMT Mitigation Program is implemented as a regional program, or provides materials, guidelines, substantial evidence, and resources for local jurisdictions to implement their own programs will be a key decision in the selection and development of the Preferred Program.

### Program Type

VMT mitigation programs generally fall into one of the following three categories:

**VMT Based Fee Program** – Developments are assessed a fee relative to the severity of their VMT related impact. The fee will be based on the projects' fair share contribution to implement off-site VMT reducing infrastructure or programs to offset or reduce the projects' impact to less than significant. The revenue collected from a Fee Program can be used to implement multi-modal and other VMT reducing infrastructure improvements, and programs outlined in the 2021 Regional Plan. Fee programs can be developed as either an impact fee program where all development pays their fair-share to mitigate the overall impacts and implement the needed infrastructure, or as an In-Lieu Fee Program where development would pay into the program in-lieu of providing their own mitigation.

**VMT Mitigation Credits/Banking** – Developments buy VMT reduction credits that are the result of previously constructed VMT reducing or planned infrastructure that will be constructed within the near future, from SANDAG or other participating jurisdictions in the region. This model operates similar to a biological mitigation bank program, or carbon offset program. The revenue collected from a Mitigation Bank can be used to construct additional VMT reducing infrastructure in new locations, to close gaps in the existing multi-modal network, improving network efficiency. Jurisdictions who construct and submit VMT reductions to the bank can also receive VMT reduction credits from the bank that can either be sold to developments to offset their impacts or used by the jurisdictions to offset VMT impacts associated with local infrastructure improvements.

**VMT Exchange Program** – Developments with VMT related impacts would work with SANDAG, or other participating jurisdictions in the region, to fund and implement off-site VMT reducing infrastructure and/or programs to offset their VMT related impacts. This model allows projects in higher VMT demand areas to invest in multi-modal, VMT reducing infrastructure in more feasible areas where higher reductions are possible and more efficient, creating systemwide improvements.

It should be noted that the Regional VMT Mitigation Program has the option to develop a hybrid program, which pairs or uses different components of the program types outlined above to create a more comprehensive program.



### All Program Options Considered

Level	Program Type	Option	Description	Pros	Cons
Regional	Credit	Regional VMT Reduction Bank (Based on Infrastructure included in the RTP)	Develop regionwide cost to reduce 1 mile of travel in the region. Calculate the VMT reductions associated with RTP based multi-modal improvements as they are implemented. Assign a cost to the VMT reductions to create regional VMT credits. Track credits in a bank to sell to developers / jurisdictions. Funds gathered credit sales will be used to implement new RTP base VMT reducing facilities.	<ul style="list-style-type: none"><li>• Regional program accessible to everyone.</li><li>• Local jurisdictions will not need to administer or monitor the program.</li><li>• Regional improvements typically have the highest VMT reductions.</li><li>• Helps to assure SCS and SB 375 compliance.</li><li>• Provides funding sources for regional VMT improvements.</li><li>• Can allow factors such as equity and equality to be accounted for in the improvement prioritization process.</li></ul>	<ul style="list-style-type: none"><li>• Costs of the program may be hard to balance due to the variances in costs and associated VMT reductions based on the improvement's location.</li><li>• May be a slow process to start.</li><li>• Requires upfront funding to implement initial improvements to generate credits.</li><li>• RTP improvements are not solely prioritized based on associated VMT reductions.</li><li>• Improvements may be limited to denser and more urban areas of the region.</li><li>• High administration costs.</li></ul>
	Credit	Regional Bank System (Local Improvements)	Jurisdictions submit VMT reducing infrastructure that they recently implemented to the Bank System. The average daily VMT reduced by the infrastructure is calculated, and bank credits are issued based on a standard regional cost-to-reduce VMT. Credits can then be sold to developers throughout the region, and local jurisdictions can receive the equivalent funding to implement additional VMT reducing infrastructure.	<ul style="list-style-type: none"><li>• Regional program accessible to everyone.</li><li>• Will provide an additional source of funding for local improvements.</li><li>• May allow for improvements to be spread more throughout the region.</li><li>• Jurisdictions will have more influence over the improvements that are implemented.</li><li>• Improvements implemented via grant funding may be eligible for VMT credits.</li></ul>	<ul style="list-style-type: none"><li>• Higher administration costs both at the regional and local level.</li><li>• Local improvements may not provide the same level of reductions as regional improvements.</li><li>• The efficiency to reduce VMT may not be the same for all jurisdictions; thus, the return on investment will not be the same.</li><li>• Requires higher effort from local jurisdictions to manage and coordinate.</li></ul>
	Credit	Affordable Housing Program	Develop a program that allows affordable housing developments that do not have a VMT related impact to sell credits to other developments. Additionally, the program could allow developments VMT impact to pay towards the development of affordable housing developments in VMT efficient areas. Payments would be collected by a regional body and allocated through a grant program.	<ul style="list-style-type: none"><li>• Regional program accessible to everyone.</li><li>• Will provide funding for and encourage affordable housing development within the San Diego Region.</li><li>• Reductions will be equal and viable across all parts of the region.</li><li>• Does not require additional permitting or construction within the public ROW.</li><li>• Can be implemented in parallel with other mitigation programs.</li></ul>	<ul style="list-style-type: none"><li>• Mitigation may not be completed prior to implementation of the impacted development; thus, may require additional CEQA efforts.</li><li>• The improvements would be towards non-public infrastructure.</li><li>• Only applies to affordable housing projects with no VMT related impacts.</li><li>• Requires additional coordination with other departments, developers, and non-profits.</li></ul>
	Exchange	Regional VMT Exchange (Based on Infrastructure included in the RTP)	Identify the cost and VMT reductions associated with VMT reducing infrastructure included in the RTP. Allow new development to implement, or fund the implementation of, improvements on the list to offset VMT related impacts.	<ul style="list-style-type: none"><li>• Regional program accessible to everyone.</li><li>• Local jurisdictions will not need to administer or monitor the program.</li><li>• Regional improvements typically have the highest VMT reductions.</li><li>• Helps to assure SCS and SB 375 compliance.</li><li>• Provides funding sources for regional VMT improvements.</li></ul>	<ul style="list-style-type: none"><li>• The cost of most regional infrastructure projects will be too high for most developments to take on.</li><li>• Permitting and implementation of improvements may take longer than local programs.</li><li>• Prioritization of projects may favor some jurisdictions over others.</li></ul>



All Program Options Considered

Level	Program Type	Option	Description	Pros	Cons
Regional	Exchange	Regional VMT Exchange (Local Improvement)	Jurisdictions can post shovel ready VMT reducing infrastructure capital projects (beyond what has been identified in the RTP) into a regional database. The database will calculate the average daily VMT reduction that would be associated with the infrastructure. Developers can then implement infrastructure on the list to offset their VMT related impacts.	<ul style="list-style-type: none"><li>• Will provide an additional source of funding for local improvements.</li><li>• May allow for improvements to be dispersed more throughout the region.</li><li>• Jurisdictions would have more influence over the improvements that are implemented.</li><li>• Construction of improvements may not require prevailing wage.</li></ul>	<ul style="list-style-type: none"><li>• Higher administration costs both at the regional and local level.</li><li>• Local improvements may not provide the same level of reductions as regional improvements.</li><li>• Improvements may need to be screened to ensure effectiveness.</li><li>• Requires higher effort from local jurisdictions.</li><li>• Eligible improvements may need to be shovel ready.</li><li>• Development will favor more efficient improvements first.</li><li>• A development project may be conditioned to work with a second jurisdiction that is not the lead agency.</li></ul>
	Exchange	VMT Reduction Grant Program	Establish a standard regional cost to reduce one mile of travel for the region. Developers can then contribute the cost per mile of travel that is needed to reduce their associated VMT impacts into a capital reserve fund. Jurisdictions then apply to receive grant funding from that fund to implement VMT reducing infrastructure.	<ul style="list-style-type: none"><li>• Will provide an additional source of funding for local improvements.</li><li>• Would be available to all jurisdictions.</li><li>• Could build off of SANDAG grant programs that are already in place.</li><li>• Could potentially be used to fund projects to become shovel ready and paired with an exchange program.</li></ul>	<ul style="list-style-type: none"><li>• Improvements would not be constructed prior to development; thus, additional CEQA work would be required.</li><li>• The cost to reduce one-mile of travel will vary from jurisdiction to jurisdiction so the portion of available grant funds may not be equitable for each jurisdiction.</li><li>• Higher admin costs.</li><li>• Improvements would need to be screened for effectiveness.</li><li>• Tracking the improvements built form the grant program may be difficult.</li></ul>
	Fee Program (In-Lieu Fee)	Regional VMT Reduction Cost (Based on Infrastructure included in the RTP)	A VMT in-lieu fee program, similar to the City of San Diego’s ATILF program, is developed based on a set of VMT reducing infrastructure included in the RTP.	<ul style="list-style-type: none"><li>• Regional program accessible to everyone.</li><li>• Local jurisdictions will not need to administer or monitor the program.</li><li>• Regional improvements typically have the highest VMT reductions.</li><li>• The program can target areas with the most needs / higher reductions.</li></ul>	<ul style="list-style-type: none"><li>• Improvements may not be constructed in all jurisdictions.</li><li>• RTP is updated every 4 years, so programs may change frequently.</li><li>• Projects are larger in nature, so they may take longer to fund.</li><li>• Permitting and implementation of improvements may take longer than local programs.</li></ul>



### All Program Options Considered

Level	Program Type	Option	Description	Pros	Cons
Regional	Fee Program (In-Lieu Fee)	Regional VMT Reduction Cost (Local Improvements)	Jurisdictions submit local VMT reducing infrastructure improvements to be included in a regional VMT in-Lieu Fee program. The typical cost to reduce one-daily mile of travel is calculated based on the proposed infrastructure that is included in the program. Development can pay into the program to offset their VMT impacts, and the revenue generated by the program is allocated to the participating jurisdictions to implement the infrastructure.	<ul style="list-style-type: none"><li>• Regional program accessible to everyone.</li><li>• Local jurisdictions will not need to administer or monitor the program.</li><li>• Improvements can be prioritized based on effectiveness, as well as equity and equality.</li><li>• Would provide a universal cost (per VMT to reduce) across the region.</li></ul>	<ul style="list-style-type: none"><li>• Improvements would not be constructed prior to development; thus, additional CEQA work would be required.</li><li>• Higher administration costs both at the regional and local level.</li><li>• Projects would need to be screened to ensure effectiveness.</li><li>• Requires higher effort from local jurisdictions.</li><li>• Prioritization of projects may favor some jurisdictions over others.</li><li>• Costs of the program may be hard to balance due to the variances in costs and associated VMT reductions based on improvement location.</li></ul>
	Fee Program	Update RTCIP	Update RTCIP to focus on VMT reducing infrastructure.	<ul style="list-style-type: none"><li>• Regional program accessible to everyone.</li><li>• No additional fees would be imposed on new development.</li><li>• A program is already in place and may only need to be modified.</li></ul>	<ul style="list-style-type: none"><li>• May not be feasible based on the language in the original TrasNet proposition.</li><li>• Would most likely not fully mitigate impacts.</li><li>• May underfund pending/approved vehicular based roadway improvements.</li><li>• Improvements may be limited to the regional arterial system.</li><li>• Would need to update/replace the RTCIP nexus study.</li></ul>
	TDM	Develop Regional TDM Program	Update the iCommute program, or create a similar program, to quantify VMT the reductions associated with program features. Allow new development to pay into the program to fund VMT reducing programs for existing business for a designated period. Research if grants can be issued to existing business to provide VMT reducing amenities (bike rack, showers, repair stations, etc.)	<ul style="list-style-type: none"><li>• Could create regionally recognized TDM guidelines (measures and associated calculations) that can be adopted by jurisdictions.</li><li>• Would allow new development to fund reductions to existing VMT generation.</li><li>• Funding could be targeted towards existing and established areas where it will be the most effective.</li></ul>	<ul style="list-style-type: none"><li>• Improvements would not be constructed prior to development; thus, additional CEQA work would be required.</li><li>• Funding would go towards private infrastructure.</li><li>• Tracking and ensuring the grant funding is spent properly could be arduous.</li></ul>
Local	All	Local VMT Committee	Develop a committee made up of members from each jurisdiction that encourages discussion and interaction of potential VMT reducing infrastructure and programs being implemented. In-Lieu of a regional program, committee members would help identify local VMT mitigation programs in which other jurisdictions can participate in.	<ul style="list-style-type: none"><li>• Would increase coordination on infrastructure planning and development throughout the region.</li><li>• Could facilitate the sharing of VMT reducing infrastructure, programs, and resources among multiple jurisdictions.</li><li>• Would be necessary for jurisdictions to allow neighbor jurisdictions to participate in their local VMT mitigation programs.</li></ul>	<ul style="list-style-type: none"><li>• Requires additional jurisdictional staff time.</li><li>• No direct VMT reductions would be associated with the committee.</li></ul>





### All Program Options Considered

Level	Program Type	Option	Description	Pros	Cons
Local	Credit	Local Bank Guidelines	Develop regional guidelines in which jurisdictions can use to develop a local VMT credit bank. The guidelines would document substantial evidence in both the effectiveness of VMT reducing facilities, as well as the methods and calculations used to quantify the reductions. The guidelines would also provide methodologies and requirements that can be used to establish the value of credits and the process of selling the credits to developers. The guidelines will also outline how the program can be integrated into CEQA findings and mitigation.	<ul style="list-style-type: none"><li>• Will provide jurisdictions flexibility in developing and implementing a program.</li><li>• Will provide substantial evidence, calculations, and methodologies for jurisdictions to create their own program.</li><li>• Guidelines will be developed with enough detail to allow jurisdictional staff develop and implement a program without outside expertise.</li><li>• Jurisdictions with excess VMT reducing infrastructure could allow development in neighboring jurisdictions to utilize the program as well.</li></ul>	<ul style="list-style-type: none"><li>• Initial effort and staff time will be required by the jurisdictions to develop and implement the program.</li><li>• Local jurisdictions will be responsible for administering, tracking, reporting, and updating the program.</li><li>• Local VMT infrastructure may not be as efficient as regional infrastructure.</li><li>• Jurisdictions may not have sufficient local VMT reducing infrastructure to fully mitigate all impacts.</li></ul>
	Credit	Affordable Housing Credits	Develop guidelines for localized programs that allow market rate developments to pay towards the development of affordable housing in exchange for the associated VMT reduction credits.	<ul style="list-style-type: none"><li>• Will provide funding for and encourage affordable housing within the San Diego Region.</li><li>• Does not require additional permitting or construction within the public ROW.</li><li>• Can be implemented in parallel with other mitigation programs.</li><li>• Will provide substantial evidence, calculations, and methodologies for jurisdictions to create their own program.</li><li>• Guidelines will be developed with enough detail to allow jurisdictional staff to develop and implement a program without outside expertise.</li></ul>	<ul style="list-style-type: none"><li>• Mitigation may not be completed prior to implementation of the impacted development; thus, may require additional CEQA efforts.</li><li>• The improvements would be towards non-public infrastructure.</li><li>• Only applies to affordable housing projects with no VMT related impacts.</li><li>• Requires additional coordination with other departments, developers, and non-profits.</li></ul>
	Credit	VMT Reduction Programs	Develop guidelines that allow for existing businesses to apply for grant funding to implement TDM based programs (e.g., showers/lockers, bike parking, bike repair, equipment that allows them to work from home, etc.) to reduce existing VMT production. The reductions from the program can then be sold to future development to replenish the next round of grant funding.	<ul style="list-style-type: none"><li>• Would allow new development to fund reductions to existing VMT generation.</li><li>• Funding could be targeted towards existing and established areas where it will be the most effective.</li><li>• Will provide substantial evidence, calculations, and methodologies for jurisdictions to create their own program.</li><li>• Guidelines will be developed with enough detail to allow jurisdictional staff to develop and implement a program without outside expertise.</li></ul>	<ul style="list-style-type: none"><li>• Initial effort and staff time will be required by the jurisdictions to develop and implement the program.</li><li>• Local jurisdictions will be responsible for administering, tracking, reporting, and updating the program.</li><li>• Improvements would not be constructed prior to development; thus, additional CEQA work would be required.</li><li>• Funding would go towards private infrastructure.</li><li>• Tracking and ensuring the grant funding is spent properly could be arduous.</li><li>•</li></ul>



### All Program Options Considered

Level	Program Type	Option	Description	Pros	Cons
Local	Credit	Land Use Exchange	Investigate the potential for developing a local land use exchange program, which allows landowners to exchange/sell density allotments in inefficient VMT areas to landowners in VMT efficient areas.	<ul style="list-style-type: none"><li>Land use density and mix has the highest effect on reducing VMT.</li></ul>	<ul style="list-style-type: none"><li>Will require substantial land use planning, mobility planning, outreach and CEQA work.</li><li>Future development assumptions are perspective and may not provide sufficient evidence to reduce VMT related impacts.</li><li>Would rely on private transactions between landowners.</li><li>A transportation infrastructure program may also be required to ensure accessibility and walk ability between the uses.</li></ul>
	Credit	Sustainable Land Use Programs	Develop a white paper outlining the best practices and potential reductions associated with jurisdictions creating sustainable land use programs to lower both existing and future VMT.	<ul style="list-style-type: none"><li>Land use density and mix has the highest effect on reducing VMT.</li><li>Higher densities could attract future transit services; thus, further reducing VMT.</li></ul>	<ul style="list-style-type: none"><li>Will require substantial land use planning, mobility planning, outreach and CEQA work.</li><li>Future development assumptions are prospective and may not provide sufficient evidence to reduce VMT related impacts.</li></ul>
	Exchange	Local VMT Exchange Guidelines	Create guidelines that outline the methods and requirements needed for a local jurisdiction to create, implement, and administer a local VMT exchange program. The guidelines will document the legal requirements to allow for development, both within the jurisdiction and outside of the jurisdiction, to implement off-site VMT reducing infrastructure to offset their VMT related impacts. The guidelines will also outline how the program can be integrated into CEQA findings and mitigation.	<ul style="list-style-type: none"><li>Will provide jurisdictions flexibility in developing and implementing a program.</li><li>Will provide substantial evidence, calculations, and methodologies for jurisdictions to create their own program.</li><li>Guidelines will be developed with enough detail to allow jurisdictional staff develop and implement a program without outside expertise.</li></ul>	<ul style="list-style-type: none"><li>Initial effort and staff time will be required by the jurisdictions to develop and implement the program.</li><li>Local jurisdictions will be responsible for administering, tracking, reporting, and updating the program.</li><li>Local VMT infrastructure may not be as efficient as regional infrastructure.</li><li>Jurisdictions may not have sufficient local VMT reducing infrastructure to fully mitigate all impacts.</li></ul>
	Fee Program	Local VMT Fee Program Guidelines	Create a resource that documents the process, methods, and requirements to develop, implement, and administer a VMT based impact fee program. The guidelines will provide a template to develop a program nexus study, a flow chart of the approval and implementation process, and the methods / tables needed to calculate the fee requirement.	<ul style="list-style-type: none"><li>Will provide jurisdictions flexibility in developing and implementing a program.</li><li>Will provide substantial evidence, calculations, and methodologies for jurisdictions to create their own program.</li><li>Guidelines will be developed with enough detail to allow jurisdictional staff develop and implement a program without outside expertise.</li><li>Guidelines may be able to create a regional nexus study which jurisdiction can use for legal justification of the fees.</li></ul>	<ul style="list-style-type: none"><li>Initial effort and staff time will be required by the jurisdictions to develop and implement the program.</li><li>Local jurisdictions will be responsible for administering, tracking, reporting, and updating the program.</li><li>Local VMT infrastructure may not be as efficient as regional infrastructure.</li><li>Jurisdictions may not have sufficient local VMT reducing infrastructure to fully mitigate all impacts.</li></ul>



All Program Options Considered

Level	Program Type	Option	Description	Pros	Cons
Local	Fee Program	Local Program Expansion	For jurisdictions that already have a local VMT mitigation program in place, the program will develop a white paper that provides guidance on how the program could be expanded to service other jurisdictions.	<ul style="list-style-type: none"><li>• Would help to fund local VMT reduction infrastructure.</li><li>• Would allow for more rural jurisdictions to mitigate VMT impacts with infrastructure in more efficient urban areas.</li><li>• Will allow for excess VMT reductions to be fully utilized.</li></ul>	<ul style="list-style-type: none"><li>• Improvements may not be constructed prior to development; thus, additional CEQA work would be required.</li><li>• Additional work may be required by jurisdictional staff to update existing programs to allow other jurisdictions to participate in.</li><li>• Jurisdictions would need to evaluate and identify if there is an excess of VMT reductions within their current program which can be sold/used by other jurisdictions.</li><li>• Will require additional administration time to track and monitor how VMT credits and or fees have been distributed or used by outside jurisdictions.</li></ul>



## Attachment 3

### High Level Program Options

#### High Level Program Options

Option	Option Name	Program Type	Notes
1	Large Regional	Regional VMT Committee	Formed from SANDAG's Mobility Working Group - Would oversee the programs
		Regional VMT Exchange Program	List/database of shovel ready VMT reducing infrastructure posted by jurisdictions for new development to construct. Jurisdictions would be responsible for posting the projects, cost, and associated VMT reductions. VMT reductions would be calculated based on a set of agreed upon guidelines, developed as part of the program. SANDAG and/or the County would maintain the database.
		Regional Credit Program	SANDAG and/or the County will develop and maintain a regional VMT credit program, where jurisdictions can submit recently constructed VMT reducing infrastructure and they will receive VMT reduction credits. The credits can then be sold to new development to offset VMT related impacts. Credit values will be issued based on a standard regional cost to reduce VMT. VMT reductions will be evaluated based on set guidelines that are developed as part of the program. SANDAG and/or the County will be responsible for maintaining the program with oversight from the Regional VMT Committee.
		Regional Affordable Housing In-Lieu Fee	Work with ASHC to develop an in-lieu fee program that will help to fund affordable housing within the San Diego Region. Funding from the program can either be used for affordable housing grants or other resources to incentivize affordable housing development.
2	Simple Regional Exchange	Regional Exchange Database	Develop a regional database where jurisdictions can post shovel ready VMT reducing infrastructure for new development to construct to offset VMT related impacts. The jurisdictions will be responsible for calculating the associated VMT reductions and working with the responsible CEQA agency on recognition and tracking of the mitigation.



## High Level Program Options

Option	Option Name	Program Type	Notes
3	Local Nexus Studies	Local In-Lieu Fee Nexus Study	Develop a nexus study that determines the cost to reduce one-mile of VMT through the development of infrastructure within the region. Due to the size of the region, the cost to reduce one-mile of travel may need to be broken into sub-regions. Program guidelines will also be developed to identify how the revenue from the fee program would need to be allocated and tracked to maintain compliance with both CEQA requirements and the Mitigation Fee Act. Jurisdictions will then have the option to adopt the program locally, or develop their own program based on the data provided.
		Local Affordable Housing Nexus Study	Develop a nexus study that identifies a relationship between affordable housing and VMT reductions. Identify the cost to reduce one mile of travel based on the development of affordable housing. Program guidelines will also be developed to identify how the revenue from the fee program would need to be allocated and tracked to maintain compliance with both CEQA requirements and the Mitigation Fee Act. Jurisdictions will then have the option to adopt the program locally, or develop their own program based on the data provided.
4	Local Guidelines	VMT Credit / Mitigation Bank Guidelines	Develop guidelines that assist jurisdictions in developing a VMT Credit / Mitigation Bank Program. The guidelines will identify the process to set up the program, the legal requirements, documentation needed, resources, calculations, and methods that should be used in developing the program.
		VMT Exchange Guidelines	Develop guidelines that assist jurisdictions in developing a VMT Exchange Program. The guidelines will identify the process to set up the program, the legal requirements, documentation needed, resources, and calculations and methods that should be used in developing the program.
5	Hybrid Program	Regional VMT Exchange Program	Develop a database of shovel ready VMT reducing infrastructure posted by jurisdictions for new development to construct. Jurisdictions would be responsible for posting the projects and costs. VMT reductions would be calculated based on a set of agreed upon guidelines developed as part of the program. SANDAG and/or the County would maintain the database.



## High Level Program Options

Option	Option Name	Program Type	Notes
5	Grant Programs	Regional Credit Program	SANDAG and/or the County will develop and maintain a regional VMT credit program, where jurisdictions can submit recently constructed VMT reducing infrastructure and they will receive VMT reduction credits. The credits can then be sold to new development to offset VMT related impacts. Credit values will be issued based on a standard regional cost to reduce VMT, VMT reductions will be evaluated based on set guidelines that are developed as part of the program. SANDAG and/or the County will be responsible for maintaining the program with oversight from the Regional VMT Committee.
	Grant Programs	Local In-Lieu Fee Nexus Study	Develop a nexus study that determines the cost to reduce one-mile of VMT through the development of infrastructure within the region. Due to the size of the region, the cost to reduce one-mile of travel may need to be broken into sub-regions. Program guidelines will also be developed to identify how the revenue from the fee program would need to be allocated and tracked to maintain compliance with both CEQA requirements and the Mitigation Fee Act. Jurisdictions will then have the option to adopt the program locally, or develop their own program based on the data provided.
6	TDM Program	Regional TDM Guidelines	Develop regional TDM guidelines and requirements that can be applied to new developments with identified VMT related impacts. Develop a calculator to help identify and quantify the VMT reductions associated with project level TDM features.
7	Regional VMT Credit Based on RTP	Regional Credit Program	Develop a regional VMT credit program based on the implementation of VMT reducing infrastructure included in the RTP. As RTP infrastructure is completed, SANDAG can sell the VMT related credits to developments with VMT related impacts. The revenue generated from the program would then be used to fund more RTP related infrastructure.
8	Grant Programs	VMT Reduction Grant Program	Establish a standard regional cost to reduce one-mile of travel for the region. Developers can then contribute the cost per mile of travel that is needed to reduce their associated VMT impacts into a capital reserve fund. Jurisdictions can then apply to receive grant funding from the capital reserve fund to implement VMT reducing infrastructure locally.



## High Level Program Options

Option	Option Name	Program Type	Notes
8	Grant Programs	Develop Regional TDM Grant Program	Update the iCommute program, or create a similar program, to quantify VMT the reductions associated with TDM program features. Allow new development to pay into the program to fund VMT reducing TDM programs and infrastructure for existing business, for a designated period. Research if grants can be issued to existing business to provide VMT reducing amenities (e.g., bike racks, showers, repair stations, etc.)



## Attachment 4

### Primary Program Option Analysis

#### Simple Regional Exchange Program

Criteria	Analysis	Points (1-5)
Legal Requirements	<p>VMT significance impact criteria are generally based on the statewide emission goals outlined in AB 32, as well as the GHG reduction targets outlined in SB 375. As such, VMT mitigation, and its associated offsets, are not restricted to the project site, nor are they limited to the jurisdiction in which a project is located. Therefore, implementing offsite VMT reducing infrastructure to mitigate a project's impacts, including in a jurisdiction that is not the lead agency but is within the state of California, would satisfy legal requirements so long as nexus is properly demonstrated. As such, the concept of a regional VMT exchange program within the San Diego Region is feasible from a legal standpoint. Moreover, options for offsite mitigation will likely be essential to achieve VMT reduction targets in light of the structural challenge of onsite mitigation for many projects. However, there may be several legal hurdles both with the timing and implementation of the infrastructure, and how that would relate to using the infrastructure as mitigation in a CEQA document.</p> <p>In cases where VMT reducing infrastructure, outside of the lead agency, is being implemented to offset VMT related impacts, there may be challenges in guaranteeing that the infrastructure will be implemented prior to the occupancy of the project. This will require a higher level of coordination between jurisdictions to ensure that the infrastructure is permitted and constructed to the proper standards within a reasonable timeframe. Additionally, the permitting and right-of-way acquisitions for the offsite improvements may present additional issues and hurdles which the lead agency cannot control. Therefore, the type of infrastructure and its ability to be shovel ready could delay the timeframe in which the mitigation is in place, potentially resulting in a time of unmitigated impacts. This may limit the type and scale of projects that jurisdictions are able to place on the exchange.</p>	4
Ability to Quantify VMT Reductions	<p>VMT reductions would be based off the methods and formulas outlined in the Handbook for Analyzing Greenhouse Gas Emission Reductions, Assessing Climate Vulnerabilities, and Advancing Health and Equity (GHG Handbook). The program will develop a VMT reduction manual which outlines and summarizes the applicable VMT reductions from the GHG Handbook, sample calculations, and links to where the required data for the analysis can be obtained. However, there could still be some variation in how the reductions are calculated. It is recommended that a committee, such as SANDAG's Mobility Working Group, provide oversight on the infrastructure submitted to the exchange program to ensure that it meets the minimum requirements, and the VMT reductions were calculated correctly.</p>	2





### Simple Regional Exchange Program

Criteria	Analysis	Points (1-5)
Total VMT Reductions	The overall VMT reductions that could be associated with this program option will depend on how active jurisdictions are in submitting potential infrastructure projects to the regional exchange program. The regional VMT exchange program will require that all projects submitted be shovel ready and included in the jurisdictions CIP program. Based on a sampling of jurisdictions in the San Deigo Region, the unfunded or unconstructed VMT reducing infrastructure within a typical CIP equates to about 1,500 miles of reduced vehicular travel. However, with the additional funding generated through these programs, it may allow for jurisdictions to include more planned VMT reducing infrastructure projects into their CIP program, based on those identified in their active transportation plan, General Plan, CAP, or other planning documents.	2
Cost Effectiveness and Affordability	Since this program option will focus on and evaluate infrastructure projects individually, the cost effectiveness may vary drastically for each infrastructure project submitted. The cost of VMT reducing infrastructure changes greatly based on the type and style of the infrastructure. For example, the cost to implement Class II Bike Lanes is approximately \$85,000 per mile, while the cost to implement a Class I Multi-Use Pathway is almost \$6.5 million per mile. While a Class I Multi-Use Pathway will typically provide a 50% higher VMT reduction than Class II Bike Lanes, the cost to reduce one mile of VMT is still significantly more affordable with bike lanes. Additionally, VMT reductions can vary greatly based on the location of the infrastructure. Based on an initial evaluation the cost to reduce one mile of travel can vary from \$2,700 to \$28,000 per mile in different jurisdictions. The wide variations are do you the type of facilities that included in the CIP as well as the density of the land uses surrounding the infrastructure.	3
Additionality	In general, there should be very limited or no additionality issues with this program, as jurisdictions would be submitting unfunded CIP projects to the Regional Exchange Program. As such, any infrastructure built through the program would not have been funded/constructed through other means. Thus, all VMT reductions associated with the infrastructure can be directly attributable to the program and used to offset VMT related impacts. It is recommended that a committee, such as SANDAG's Mobility Working Group, provide oversight to ensure that the infrastructure submitted to the program were not previously funded CIP projects.	5



### Simple Regional Exchange Program

Criteria	Analysis	Points (1-5)
Geographic Scope and Fit	This program option will provide participating jurisdictions flexibility in the infrastructure that they submit to the exchange, both in type, requirements, and design. However, where the infrastructure is constructed will be up to those seeking VMT offsets, who most likely seek the most cost-effective option available. VMT reducing infrastructure located within denser areas with a higher population are far more effective than more suburban and rural areas. As such, improvements within more urban areas will have a greater VMT reduction, thus, resulting in a lower cost to reduce one mile of travel, thus, they will most likely be constructed first. Conversely, more complex and expensive infrastructure, such as Class I Multi-Use Pathways, or infrastructure in suburban and rural jurisdictions, which are less cost efficient, will be implemented last, or potentially not at all. This may result in an imbalance of benefits and utility for the different jurisdictions within the region.	2
Equity	The infrastructure submitted to the Regional Exchange Program would be done so at the will of the participating agency and implemented at the will of a development project seeking a VMT offset, individually. Thus, there would be no guiding influence nor prioritization by an overseeing group/agency to prioritize the development infrastructure projects within disadvantaged or underserved areas. As such, it's assumed that developers who are seeking VMT offsets will prioritize the infrastructure projects with the lowest cost to reduce one-mile of travel. This could present an obstacle for communities whose current infrastructure may have been underserved over the year and has degraded over time and may require additional costs to upgrade. Due to these additional costs, infrastructure projects within these areas may be less cost efficient and less attractive to build for VMT offsets.	1
<b>Total</b>		<b>19</b>



### Guidelines for Local Programs

Criteria	Analysis	Points (1-5)
Legal Requirements	The legal requirements for setting up both a VMT Exchange and Credit Program will both be outlined in the guidelines. The guidelines will also provide a list of eligible facility types that can be included within the program, as well as the methods, assumptions, and formulas needed to calculate the VMT reductions. Finally, the guidelines will outline the documentation, document posting, and financial transparency requirements that each program will need to follow to be consistent with the Mitigation Fee Act. However, it will still be the responsibility of each jurisdiction to ensure that the legal requirements for each program type are met, and that the program is updated to meet legal changes as needed. Thus, while the local scope of each program will likely make nexus analysis more straightforward, there will be fewer regional resources committed to ongoing legal support or potential litigation.	3
Ability to Quantify VMT Reductions	The guidelines will provide the methods, assumptions, and formulas needed to calculate the VMT reductions for the infrastructure types that can be included in the exchange or VMT credits can be claimed for. However, it will be the responsibility of each jurisdiction to quantify the VMT reductions that would be associated with the infrastructure improvements that can be included within the program(s). Thus, quantification methodologies will be more locally tailored than in a regional program but there will also be greater heterogeneity and potentially less capacity to develop and modulate over time.	2
Total VMT Reductions	Since this program option will focus on and evaluate infrastructure projects individually, the cost effectiveness may vary drastically for each infrastructure project submitted. The cost of VMT reducing infrastructure changes greatly based on the type and style of the infrastructure. For example, the cost to implement Class II Bike Lanes is approximately \$85,000 per mile, while the cost to implement a Class I Multi-Use Pathway is almost \$6.5 million per mile. While a Class I Multi-Use Pathway will typically provide a 50% higher VMT reduction than Class II Bike Lanes, the cost to reduce one mile of VMT is still significantly more affordable with bike lanes. Additionally, VMT reductions can vary greatly based on the location of the infrastructure.	3
Cost Effectiveness and Affordability	Jurisdictions will have the control and flexibility on the types and requirements for the VMT reducing infrastructure that is included within the program(s) they develop, based on the guidelines. Therefore, jurisdictions will have the choice focus on more cost-effective infrastructure such as Class II Bike Lanes, or less efficient but more neighborhood friendly infrastructure, such as Class I Multi-Use Pathways, or a mixture of the two. Thus, the cost effectiveness of the program will be up to each jurisdiction (and participating entities) separately.	3



### Guidelines for Local Programs

Criteria	Analysis	Points (1-5)
Additionality	<p>Jurisdictions should be including unfunded CIP projects in their Exchange Program, so there should be limited to no additionality issues. Any infrastructure built through the program would not have been funded/constructed through other means. Thus, all VMT reductions associated with the infrastructure can be directly attributable to the program and used to offset VMT related impacts.</p> <p>VMT Credit Programs will require slightly more analyses and justification to verify that the infrastructure would be built without the program; thus, its VMT, or a portion of it, cannot be claimed as credit. The VMT Credit Program Guidelines will include the methods and processes that each infrastructure project will need to go through to determine if and how much of the VMT reduced by the infrastructure would be eligible to sell as credit.</p>	3
Geographic Scope and Fit	<p>Each jurisdiction will have the ability to develop programs that best fit their community and its needs. Jurisdictions will also have the choice to allow their developers to offset either a portion, or all of their VMT related impacts by using other jurisdictions programs. The program will also give jurisdictions the flexibility to allow other jurisdictions to participate in their program or keep it local for their own needs. Thus, this program option will tend to maintain local mitigation while providing jurisdictions and developers with flexibility in VMT reduction strategies.</p>	5
Equity	<p>The prioritization of infrastructure within underserved communities or within communities of needs will be up to the jurisdiction developing the program. Therefore, it cannot be projected how equitable this program option would be. Thus, a score of three was assigned as it is the neutral point on a five-point scoring system.</p>	3
<b>Total</b>		<b>22</b>



## Hybrid Program

Criteria	Analysis	Points (1-5)
Legal Requirements	<p><u>Regional Exchange &amp; Credit Programs</u> As noted under the Regional Exchange Program, VMT mitigation and offsets are not restricted to the project site, nor are they limited to the jurisdiction in which a project is located. Therefore, implementing VMT reducing infrastructure to mitigate a project's impacts in a jurisdiction outside of the lead agency, as would be done with the regional exchange and credit programs, is legal.</p> <p>The exchange program may encounter some challenges in guaranteeing that the infrastructure will be implemented prior to the occupancy of the project. This will require a higher level of coordination with the participating jurisdictions to ensure that the infrastructure is permitted and constructed to the proper standards within a reasonable timeframe. Additionally, the permitting and right-of-way acquisitions for the offsite improvements may present additional issues and hurdles in which the lead agency cannot control. Therefore, the type of infrastructure and its ability to be shovel ready could delay the timeframe in which the mitigation is in place, potentially resulting in a time of unmitigated impacts.</p> <p><u>In-Lieu Fee Program</u> An in-lieu fee program is also a common way to mitigate impacts of all types. A regional nexus study will be developed to establish the relationship between the ability of different infrastructure types to reduce VMT and their associated cost. The nexus study will be conducted in accordance with the mitigation fee act; thus, providing the legal justification for jurisdictions to implement the fee program. Guidelines will also be produced to instruct jurisdictions on the requirements for implementing, tracking, and publicly reporting on the program.</p>	4
Ability to Quantify VMT Reductions	<p><u>Regional Exchange &amp; Credit Programs</u> As part of the program oversight, SANDAG and/or the County would be responsible for calculating the VMT reductions associated with the submitted VMT reducing infrastructure. As such, the quantification of VMT reductions would be uniform across both programs.</p> <p><u>In-Lieu Fee Program</u> VMT reduction calculations would be quantified for a series of example projects, throughout different parts of the region, within the regional nexus study. As such, the quantification of VMT reductions would be uniform for all jurisdictions.</p>	4



## Hybrid Program

Criteria	Analysis	Points (1-5)
Total VMT Reductions	<p><u>Regional Exchange Program</u></p> <p>The overall VMT reductions that could be associated with this program option will depend on how active jurisdictions are in submitting potential infrastructure projects to the regional exchange program. The regional VMT exchange program will require that all projects submitted be shovel ready and included in the jurisdictions CIP program. Based on a sampling of jurisdictions in the San Deigo Region, the unfunded or unconstructed VMT reducing infrastructure within a typical CIP equates to about 1,500 miles of reduced vehicular travel. However, with the additional funding generated through these programs, it may allow for jurisdictions to include more planned VMT reducing infrastructure projects into their CIP program, based on those identified in their active transportation plan, General Plan, CAP, or other planning documents.</p> <p><u>Regional Credit Program</u></p> <p>The Regional Credit Program will allow jurisdictions to also invest in VMT reducing infrastructure within their CIP program without tying it to future development. The VMT reductions associated with the infrastructure can then be sold to new development through the Regional Credit Program, and the revenue received for the credits can be used to help fund future VMT reducing infrastructure within the City's CIP.</p> <p><u>Local In-Lieu Fee Programs</u></p> <p>Finally, the quantification of the VMT reductions associated with the local programs would be dependent on the infrastructure the jurisdiction decides to include in the program, as well as the overall VMT reducing capacity that the jurisdiction has based on its roadway network and land use densities.</p>	4
Cost Effectiveness and Affordability	<p>The regional and local components included in this program option create a higher potential for cost effective VMT reductions for all jurisdictions within the region. Jurisdictions with a high capacity for VMT reductions, can develop local in-lieu fee programs that focus on implementing the most cost-effective VMT reducing infrastructure locally. The VMT reducing infrastructure not included within the local programs can be submitted to regional exchange and allow development in less efficient communities to develop it. Jurisdictions with limited VMT reducing infrastructure, or low efficient VMT reducing infrastructure, have a series of options to help mitigate VMT impacts including creating their own Local In-Lieu fee program, allowing development to utilize the regional programs, or developing a hybrid system where development can utilize both resources to offset their VMT related impacts at a more affordable cost. Based on an initial evaluation the cost to reduce one mile of travel can vary from \$2,700 to \$28,000 per mile in different jurisdictions. The wide variations are do you the type of facilities that included in the CIP as well as the density of the land uses surrounding the infrastructure.</p>	5



## Hybrid Program

Criteria	Analysis	Points (1-5)
<p>Additionality</p>	<p><u>Regional Exchange Program</u> In general, there should be limited to no additionality issues with this program, as jurisdictions would be submitting unfunded CIP projects to the regional exchange program. The infrastructure built through the program would not have been funded/constructed without the exchange program, meaning all VMT reductions associated with the infrastructure can be directly attributable to the program and used to offset VMT related impacts.</p> <p><u>Regional Credit Program</u> There may be some additionality concerns within the Regional Credit Program, as the design and construction of the infrastructure would have already been funded through existing means. Therefore, it can be argued that the VMT reductions would have occurred through the normal course of City actions, so the program cannot claim credit for the reductions. The credit program would need to present evidence that the funding received would help to prioritize the VMT reducing infrastructure resulting in its construction being accelerated, and/or helping to guarantee that it is implemented. In these cases, the program may only be able to credit a portion of the cost to VMT reducing infrastructure.</p> <p><u>Local In-Lieu Fee Program</u> Similar to the Regional Exchange Program, the Local In-Lieu Fee program should focus on unfunded VMT reducing infrastructure. Therefore, the program would help fund infrastructure that the City would otherwise not be afforded to implement. Thus, any additionality issues would be limited.</p>	<p>3</p>
<p>Geographic Scope and Fit</p>	<p>Since this program option has both a regional and local mitigation layer it provides the ultimate flexibility for jurisdictions. Jurisdictions who may have limited VMT reducing capacity can implement a local in-lieu fee program to help buildout their limited local infrastructure, and then utilize the regional programs to fill their excess mitigation needs. Conversely, jurisdictions who may have more VMT reducing capacity than they need to mitigate their VMT impacts, can implement a Local In-Lieu fee program to capture funding from local development, and post any excess VMT reducing infrastructure to the regional programs to help offset impacts from other jurisdictions.</p>	<p>5</p>



### Hybrid Program

Criteria	Analysis	Points (1-5)
Equity	<p><u>Regional Exchange Program</u> The infrastructure submitted to the Regional Exchange Program would be done so at the will of the participating agency and implemented at the will of a development project seeking a VMT offset, individually. Therefore, there would be no guiding influence nor prioritization by an overseeing group/agency to prioritize the development infrastructure projects within disadvantaged or underserved areas. As such, it's assumed that developers who are seeking VMT offsets will prioritize the infrastructure projects with the lowest cost to reduce one-mile of travel. This could present an obstacle for communities whose current infrastructure may have been underserved over the years and has degraded over time and may require additional costs to upgrade. Due to these additional costs, infrastructure projects within these areas may be less cost efficient and less attractive to build for VMT offsets.</p> <p><u>Regional Credit Program</u> Infrastructure submitted to the Regional Credit Program will be based on VMT reducing infrastructure that was constructed by the jurisdictions. As such, it will be up to each jurisdiction to decide if they want to prioritize constructing infrastructure in underserved communities. Therefore, equity is not an aspect in which the credit program will be able to necessarily control.</p> <p><u>Local In-Lieu Fee Program</u> Finally, the prioritization of infrastructure within underserved communities or within communities of needs, will be up to the jurisdiction developing the Local In-Lieu fee Program. Therefore, it cannot be projected how equitable this program option would be.</p>	2
<b>Total</b>		<b>27</b>





### Regional VMT Credit Based on RTP

Criteria	Analysis	Points (1-5)
Legal Requirements	Mitigation credit programs have been well established for several years for other impact types, such as biology, habitat, and GHG production. Therefore, the legal precedent, standards, and caselaw have been well established, and can be referenced, for these types of programs. However, as noted in a subsequent section, there may be some legal questions that may need to be ironed out in regard to additionality of the VMT reductions for which the credits are issued.	4
Ability to Quantify VMT Reductions	SANDAG's Regional Plan conducts detailed modeling and analyses to evaluate the VMT productions and reductions that are associated with the Regional Plan for both the land use growth and transportation infrastructure included within the Plan. The Regional Plan also sets the transportation modeling baseline that is used for VMT analyses throughout the region. As such, the Regional Plan provides a comprehensive and quantitative VMT analysis, including the reduction associated with the program, which can be utilized in the development of a VMT Credit Program.	5
Total VMT Reductions	The transportation infrastructure included in the Draft 2025 Regional Plan is anticipated to reduce the daily VMT within the region by approximately 2.6 million miles per day <sup>2</sup> . This will reduce the average daily VMT per capita in the region from 16.73 per capita to 15.39 per capita <sup>3</sup> . As compared to the previous alternatives, due to its regional nature, this program option will result in the highest potential for VMT reductions for the region.	5
Cost Effectiveness and Affordability	The Regional Plan focuses on implementing complex regional infrastructure, which is generally higher in cost than locally based infrastructure. Additionally, the infrastructure included in the program focuses on connecting different communities and filling gaps in the transportation network, which may not be able to generate the funding at the local level. Therefore, the infrastructure included in the program is not as efficient, from a cost per vehicular mile reduced standpoint, as some local based improvements. The average cost to reduce one-mile of vehicular travel would be \$24,700 <sup>2</sup> , which is generally the highest of all program options.	2

<sup>2</sup> Note: This information is based on SANDAG's 2025 Regional Plan, which is still in Draft form and is subject to change. Thus, the information presented is not official, it is just the best estimate that can be provided at the time of writing this memo.

<sup>3</sup> Source: SANDAG Activity Based Model version 3 (ABM). Note that model was in draft form at the time of writing this memo; thus, these numbers are not official and are subject to change.



### Regional VMT Credit Based on RTP

Criteria	Analysis	Points (1-5)
Additionality	<p>The Regional Plan does identify and/or assumes funding sources for all of the infrastructure included within its constrained alternative. Therefore, it could be assumed that the infrastructure included within the Regional Plan would be implemented without the benefit of a credit program. Thus, the credit program would need to present evidence that the funding received would help to prioritize the VMT reducing infrastructure resulting in its construction being accelerated, and/or helping to guarantee that it is implemented. Additionally, the Regional Plan is updated every four years, so if the credit program is successful, subsequent Regional Plans can assume funding from the program as part of its budget and expand the multi-modal facilities included in the constrained alternative.</p> <p>Based on the issues outlined above, it is anticipated that issuing VMT reduction credits for infrastructure implemented by the Regional Plan would have some additionality challenges. Most likely, VMT credits may only be able to be issued for a percentage of the implementation cost. Since the infrastructure projects included in the Regional Plan are different from a timing, funding, and VMT efficiency standpoint, the program may need to evaluate each project on a case-by-case basis to identify the percentage of the VMT reduction that can be allocated as a credit.</p>	1
Geographic Scope and Fit	The Regional Plan implements major transportation infrastructure projects throughout the entire San Diego Region. However, the majority of the infrastructure projects are located within the higher populated and more urbanized areas of the region and does not include many localized infrastructure projects located in smaller jurisdictions. Therefore, this program may not provide a benefit for all jurisdictions within the region.	2
Equity	The VMT reduction credits would be issued based on the implementation of VMT reducing infrastructure included within the regional plan. Since the credits are issued after the construction of the infrastructure the program would have no bearing or influence on where and when the infrastructure is built. As such, the equity associated with the program would not be accounted for.	1
<b>Total</b>		<b>20</b>

# San Diego Region VMT MITIGATION PROGRAM

TRANSPORTATION COMMITTEE

6.6.2025



G  
R  
A  
N  
T

Caltrans  
Sustainable  
Transportation  
Planning Grant

\$480,000 in  
Grant Funds

Program Needs  
to be Completed  
by June 30, 2026

01

02

03

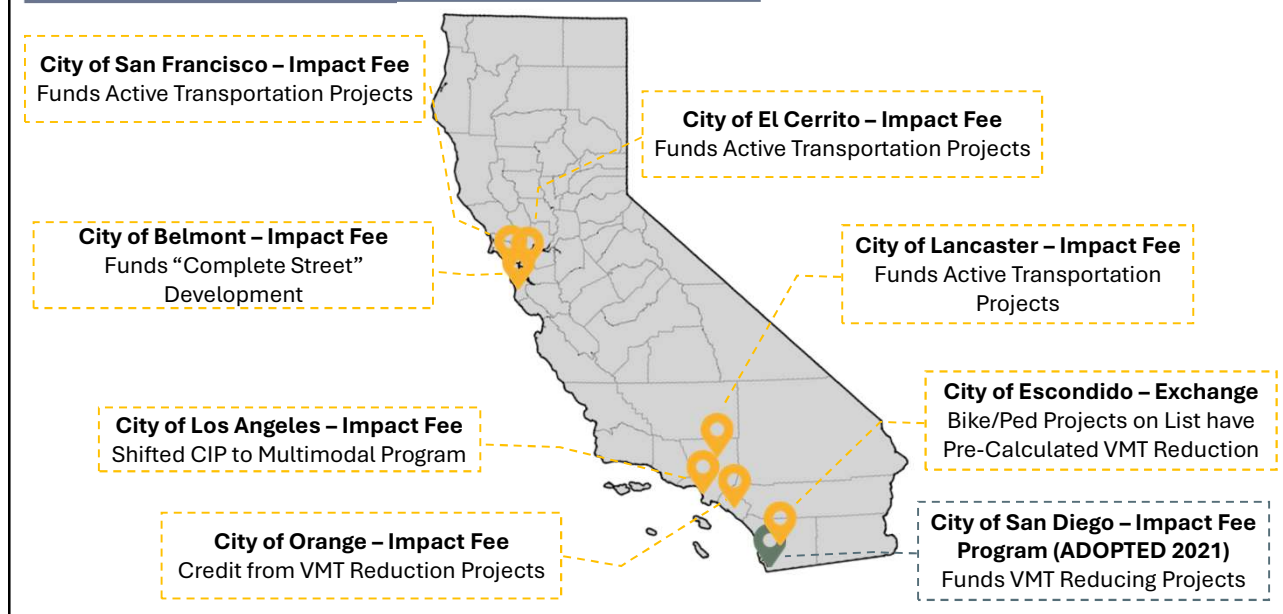
04

05

Partnership Between  
SANDAG and the  
County of San Diego

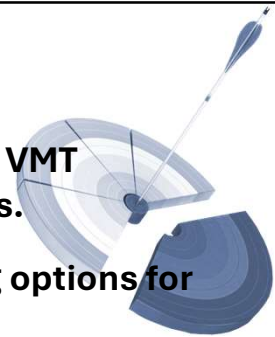
\$137,750 in Local  
In-Kind Match

## OTHER FEE PROGRAMS IN CA



## Program Goals

- 1 Provide a mechanism to mitigate project related VMT impacts leveraging regional assets and programs.
- 2 Facilitate project related VMT mitigation costing options for the San Diego region.
- 3 Prioritize the implementation of VMT reducing infrastructure, multi-modal facilities, and programs in disadvantaged communities.
- 4 Incentivize sustainable growth and development throughout the San Diego region.
- 5 Support the implementation of VMT reducing infrastructure and programs outlined in the 2021 Regional Plan.



## Scope of Work

01



Technical Advisory Committee and Public Outreach

02



Regional VMT Mitigation Framework Evaluation Criteria

03



Regional VMT Mitigation Program Options

04



Regional VMT Mitigation Framework Evaluation Criteria

05



Finalize VMT Mitigation Program and Approval

## VMT Program Misconceptions

The Program will not be mandatory for jurisdictions to implement



This is not the Roadway User Charge



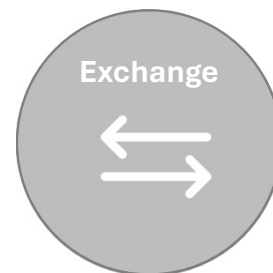
The Program will not allow developments to move forward without a VMT analysis

The Program will not require you to change your transportation Impact standards/guidelines





## General Types of Mitigation Programs

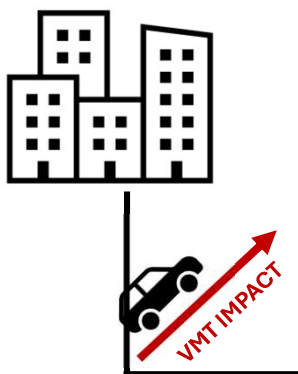


### Program Types – In Lieu Fee

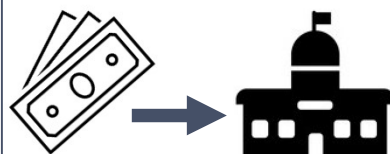
#### Example:

#### CITY OF SAN DIEGO ACTIVE TRANSPORTATION IN-LIEU FEE PROGRAM

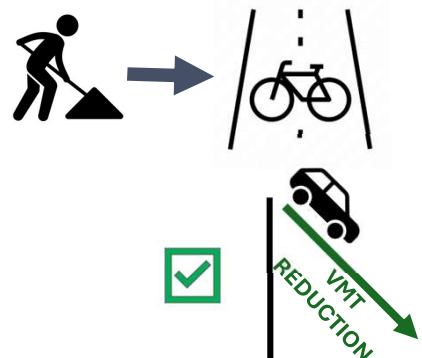
Projects with VMT Impacts



Pays Fees to a Jurisdiction



Jurisdiction Uses Fee Revenue to Builds Multi-Modal Facilities

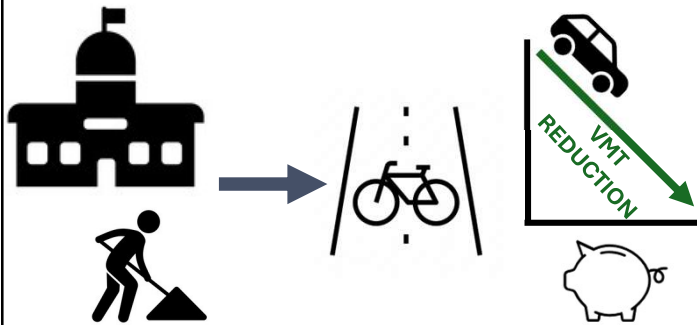


## Program Types – Mitigation Bank

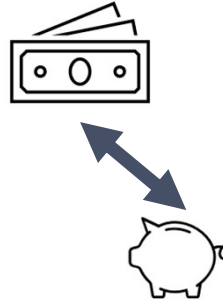
### Example:

#### LA METRO VMT MITIGATION BANK PILOT PROGRAM

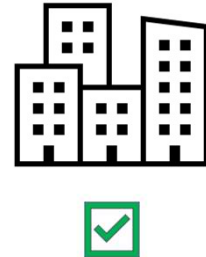
Jurisdictions Build Multi-Modal Facilities and Bank the Credits for the Associated VMT Reductions



Jurisdictions Sell the VMT Credits to Impacted Projects



Credits Off-Set Project's VMT Impacts



## Program Types – Exchange Program

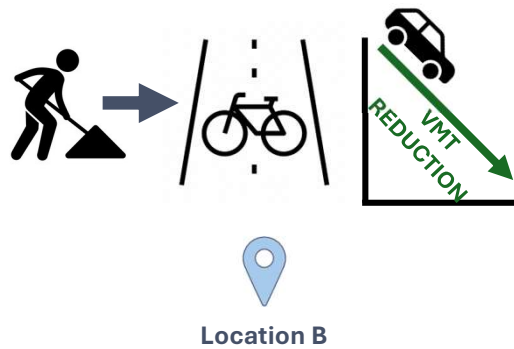
### Example:

#### CITY OF ESCONDIDO VMT EXCHANGE PROGRAM

Projects with VMT Impacts In Location A



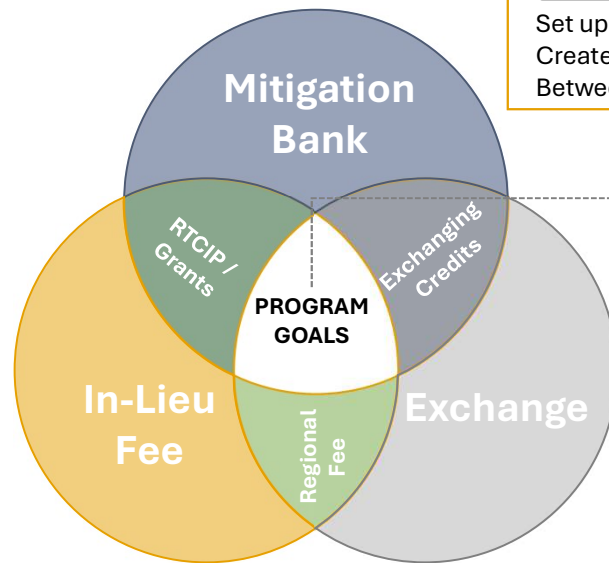
Can Construct Off-Site Multi-Modal Infrastructure in Location B



VMT Reductions Off-Set Project's VMT Impacts



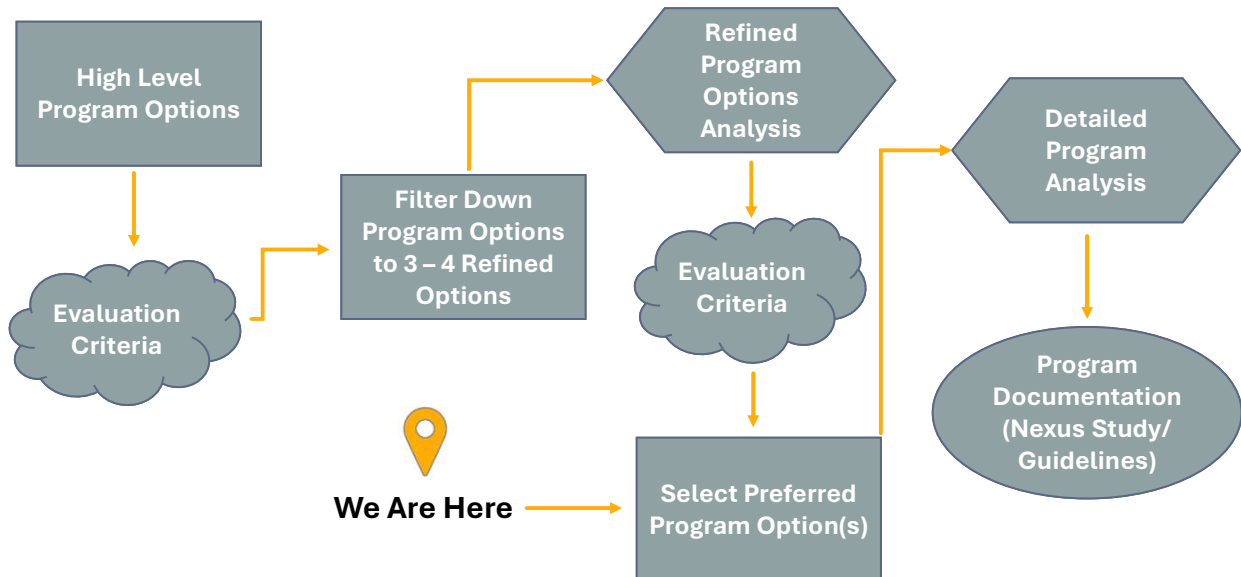
## Hybrid System



### PROGRAM GOALS

Set up Regional Fee & Bank Programs  
Create a Framework for Interactions  
Between Local Jurisdictions

## Program Development Process

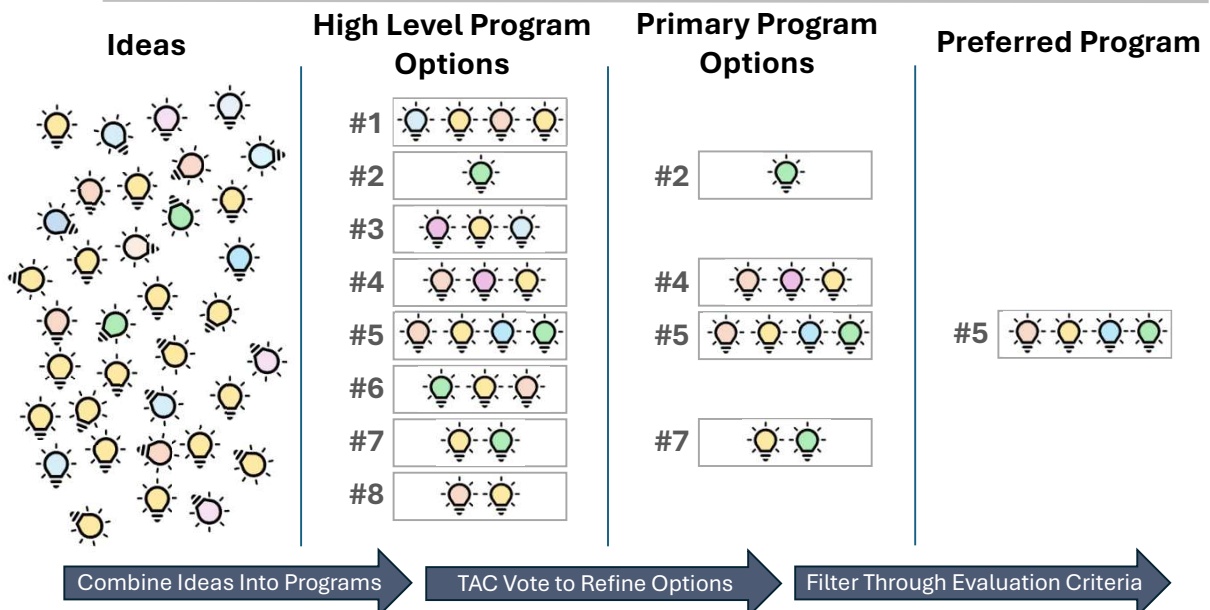




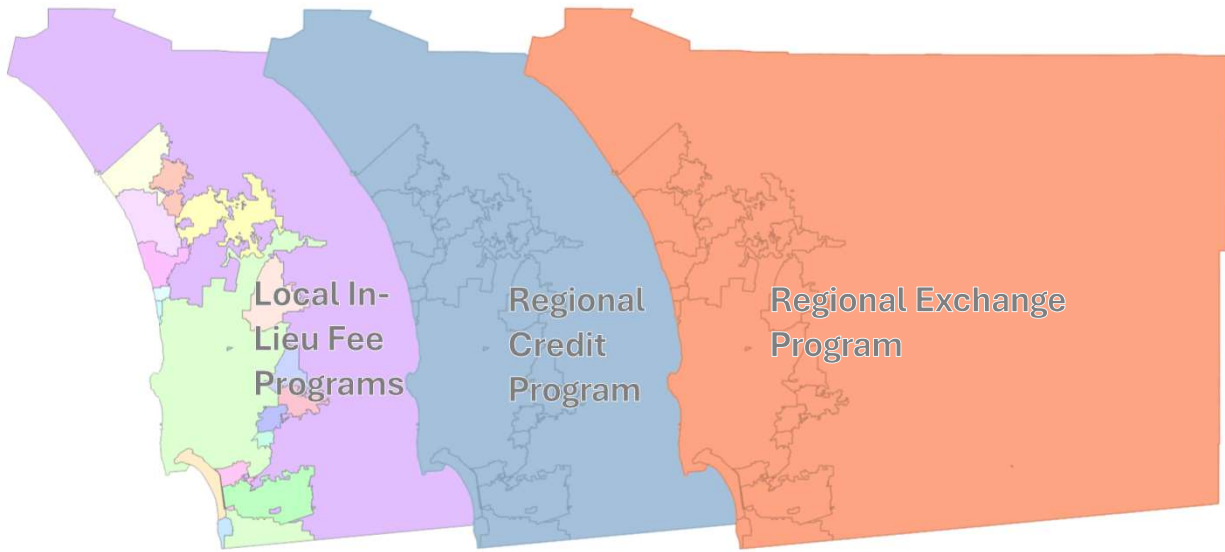
## 4 Role of the TAC



## Program Development Process



## Preferred Program Option



## Next Steps



## Schedule



Questions?