

I. 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 help award 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
1.	FINANCIAL SUSTAINABILITY	20
1.1	Stable Future Funding Sources* Does the Applicant propose stable, future funding sources to fund the project for one or more years beyond the Grant Term?	10
1.2	Strategy to Attain Future Funding Does the Applicant have a feasible strategy for attaining future funding for the Flexible Fleet project?	10
2.	CONNECTIVITY	20
	The Applicant should demonstrate either: <ul style="list-style-type: none"> How the service will operate in an area lacking existing bus and/or rail services. How the service will connect riders to existing bus and/or rail services in the area. 	20
3.	ENGAGEMENT	15
	Does the Applicant: <ul style="list-style-type: none"> Identify engagement goals? Put forth a plan for engaging community members and organizations throughout the program? Demonstrate how hard-to-reach populations (e.g., individuals with disabilities, senior residents) will be engaged? Propose an effective marketing and engagement strategy that includes specific methods to promote sustainable transportation choices? Identify a plan to survey riders and community members before the program launch and throughout the program? 	15

4.	ACCESSIBILITY	15
	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
5.	FEASIBILITY & PERFORMANCE	20
	<ul style="list-style-type: none"> • All Pilot Types: <ul style="list-style-type: none"> ○ 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 the procurement of goods and services? ○ Does the funding amount request match the scope (vehicles, infrastructure, operations platform, etc.)? ○ Does the Applicant identify a service zone that is realistic and feasible? ○ Does the Applicant include a map of the proposed service area? ○ Is the program fleet size feasible with the proposed schedule, budget, and service zone? • Enhanced Pilots Only: <ul style="list-style-type: none"> ○ Does the Applicant describe how the proposed modifications to existing pilot operations will improve service and accommodate new growth? This may include performance metrics or other supporting information that demonstrate the program's success and the benefits of its continuation. 	
6.	MATCHING FUNDS*	10
	Points will be awarded based on the scale provided in the Scoring Rubric.	
	TOTAL	100

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 the 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 revenue source 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, the Applicant must have the authority to authorize the funding in the future, or the Applicant must have a letter of commitment from the organization authorizing the funding.

*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 48 months or greater following the end of the Grant Term.	10 points
The application includes stable future funding for 36-47 months following the end of the Grant Term.	8 points

The application includes stable future funding for 24-35 months following the end of the Grant Term.	6 points
The application includes stable future funding for 12-23 months following the end of the Grant Term.	4 points
The application includes stable future funding for 7-11 months following the end of the Grant Term.	2 points
The application includes stable future funding for 6 months following the end of the Grant Term.	1 point
The application does not include stable future funding, or the included sources are for less than 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 and likelihood for securing a stable funding source following the end of the Grant Term, and provide supporting documentation or evidence that it will be secured. For example, the application should outline the steps required to establish a parking district and generate revenue through parking fees, or allocate general funds to the program annually. Applicants should also identify a timeline for securing each future funding source, including the duration of availability and the likelihood of securing it.

Applicant Response	Points
Clearly and convincingly demonstrates a feasible strategy and likelihood for the Applicant to financially sustain the Flexible Fleet project in the long term, and provides substantive documentation or evidence.	10 points
Sufficiently demonstrates a feasible strategy and likelihood 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 and likelihood 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 and likelihood for the Applicant to financially sustain the Flexible Fleet project in the long term, but provides incomplete documentation or evidence.	4 points
Minimally demonstrates a feasible strategy and likelihood for the Applicant to financially sustain the Flexible Fleet project in the long term, and provides little to no documentation or evidence.	2 points
Unable to address the 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 or rail services.
 - The Applicant could also demonstrate how the project will fill an existing transit need gap. For example, providing service on days or hours when transit is not operating, 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 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 or stations, service is staged or docked at these locations, and signage or other advertising for the service is displayed at transit stops or 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 the 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. 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 engagement plan methods include surveys and questionnaires, community presentations to gather feedback, and online 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 outlines the methodology by which the service addresses the specific needs of the community.
- Propose an effective marketing and engagement strategy that includes specific methods to promote the flexible fleet mode.
- Determine engagement methods and strategies, including how to effectively engage hard-to-reach populations (e.g., individuals with disabilities, senior residents). Pre-launch and continuous community surveying are required for the Flexible Fleets Pilot Grant Program.
- Develop an action plan to continue periodic engagement. This should include surveying riders and community members throughout the service delivery and incorporating feedback into operational adjustments. 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.
- How the Applicant will evaluate and measure how the service meets the needs of the community.

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 the 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 (individuals with disabilities, 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 required for the Flexible Fleets Pilot Grant Program.

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

5. FEASIBILITY & PERFORMANCE

Up to 20 points possible

Applicants will receive points based on the project's feasibility and performance, as demonstrated by the proposed scope of work, schedule, and budget. The following factors should be considered for both pilot types (New Pilots and Enhanced Pilots).

- 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 the 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 several demand and service design factors, including population and 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 well-suited to a large service zone with high ridership potential or demand.

For Enhanced Pilots, the Applicant should also respond to the following question:

- Describe the proposed modifications to existing pilot operations. Explain how these modifications will improve service and accommodate new growth. Provide backup information that demonstrates the success of the program and the benefit of its continuation (e.g., performance metrics, testimonials, survey responses).

Applicant Response	Points
<p>Clearly and convincingly demonstrates:</p> <ul style="list-style-type: none"> • (All Project Types) How the project scope of work, schedule, and budget are feasible and realistic • (Enhanced Pilots) Significant modifications were made to an existing pilot to improve service and accommodate new growth <p>The application provides substantive documentation or evidence.</p>	<p>20 points</p>
<p>Sufficiently demonstrates:</p> <ul style="list-style-type: none"> • (All Project Types) How the project scope of work, schedule, and budget are feasible and realistic • (Enhanced Pilots) Significant modifications were made to an existing pilot to improve service and accommodate new growth <p>The application provides adequate documentation or evidence.</p>	<p>16-19 points</p>

<p>Mostly demonstrates:</p> <ul style="list-style-type: none"> (All Project Types) How the project scope of work, schedule, and budget are feasible and realistic (Enhanced Pilots) Significant modifications were made to an existing pilot to improve service and accommodate new growth <p>The application provides general documentation or evidence.</p>	11-15 points
<p>Partially demonstrates:</p> <ul style="list-style-type: none"> (All Project Types) How the project scope of work, schedule, and budget are feasible and realistic (Enhanced Pilots) Significant modifications were made to an existing pilot to improve service and accommodate new growth <p>The application provides incomplete documentation or evidence.</p>	6-10 points
<p>Minimally demonstrates:</p> <ul style="list-style-type: none"> (All Project Types) How the project scope of work, schedule, and budget are feasible and realistic (Enhanced Pilots) Significant modifications were made to an existing pilot to improve service and accommodate new growth <p>The application provides incomplete documentation or evidence.</p>	1-5 points
Unable to address the criterion, even to a minimal extent.	0 points

6. MATCHING FUNDS*

Up to 10 points possible

Points for Matching Funds will be awarded based on the following scale. 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.

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

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
11.47% - 15.00% of the Total Project Cost	2 points
Below 11.47% of the Total Project Cost	Ineligible Project

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