



2018 Specialized Transportation Call for Projects

APPLICATION INSTRUCTIONS

Measure I Specialized Transportation Program

For Use by Agencies and Organizations in the San Bernardino Valley

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**OmniTrans
1700 W. 5th Street
San Bernardino, CA 92411**

A. GRANT APPLICATION PROCEDURES

ALL APPLICATIONS DUE:

January 15, 2018

Must be received by 4:00 pm.

Each application must be submitted, including one (1) signed original and five (5) copies plus one (1) electronic copy on a CD or flash drive. Applications must be submitted to and received by Omnitrans no later than **4:00 pm, January 15, 2018**. Faxes will not be accepted.

Applications must be submitted to:

Omnitrans
1700 W. 5th Street
San Bernardino, CA 92411
ATTN: Special Transportation Services

The information in submitted applications will become a matter of public record following completion of the evaluation and award process. Any information contained in an application that is deemed as proprietary, privileged or confidential by the applicant agency or organization must be clearly marked "Confidential."

APPLICANT WORKSHOP

A pre-application workshop will be held for agencies to learn more about the application and selection processes, and to ask any questions prospective agencies may have about the funding program, project eligibility or evaluation process. All prospective applicants are **encouraged** to attend the pre-application workshop.

Details of the application workshop are as follows:

DATE: December 13, 2017 **(Tentative)**
TIME: 2 pm – 4 pm
LOCATION: Omnitrans Offices
1700 W. 5th Street,
San Bernardino, CA 92411

B. APPLICANT CHECKLIST

Applicants should use this checklist to ensure that **all applicable** parts of the application are completed and submitted. Incomplete applications may be disqualified from further consideration.

MEASURE I PROPOSED PROJECT APPLICATION: (Required to be completed by ALL Applicants)

SECTION	TITLE
I	AGENCY PROFILE – PROJECT SUMMARY
II	ORGANIZATIONAL CAPABILITIES
III	PROPOSED PROJECT NARRATIVE
VI	COORDINATION
V	PROPOSED PROJECT BUDGET

C. PROGRAM OVERVIEW

This offering invites proposals for funding available through Measure I local sales tax revenue for the San Bernardino Valley subarea. The funding program is summarized below.

Funding in this Call for Projects is available only in the San Bernardino Valley subarea. The San Bernardino Valley Subarea will include the cities of Chino, Chino Hills, Colton, Fontana, Grand Terrace, Highland, Loma Linda, Montclair, Ontario, Rancho Cucamonga, Redlands, Rialto, San Bernardino, Upland and Yucaipa and unincorporated areas in the east and west portions of the San Bernardino valley urbanized area. A portion of a one-half of one percent (0.5%) sales tax approved by the voters and generated in the incorporated and unincorporated territory of the County of San Bernardino, supports specialized transportation services directed to serve seniors and persons with disabilities. **The Measure I ordinance requires that these funds shall not supplant any other type of funding already in use for the proposed service.**

A portion of the revenue collected in the Valley Subarea shall fund Senior and Disabled Transit Service. Expenditures may include funding to reduce fares and enhance service for senior citizens and persons with disabilities, including: (1) The provision of funding to off-set a portion of future senior and disabled fare increases that would apply to fixed route, OmniGo and complementary paratransit services. (2) The provision of local funds to help offset operating costs associated with special transit services provided by transit operators, cities and non-profit agencies for seniors and persons with disabilities. Priority will be given to projects that provide services and/or enhance services in a cost-effective manner.

D. PROGRAM REQUIREMENTS

A. Eligible Applicants:

Applicants may include local government authorities, human and social services agencies, tribal governments, private non-profit organizations and public transportation operators.

B. Requirement for Use of Program Funds:

The Measure I funding program requires that all projects selected for funding **must be included in the Public Transit-Human Services Transportation Coordination Plan for San Bernardino County, 2016-2020** (Coordinated Plan). The Coordinated Plan document is available online at:

<http://www.gosbcta.com/plans-projects/plans/public-transit-coord-plan-2016-20-draft.pdf>

The Public Transit-Human Services Transportation Coordination Plan for San Bernardino County, 2016-2020 identifies existing transportation services, unmet transportation needs and service gaps, as well as the prioritized goals and strategies by which to meet transportation needs on behalf of seniors (62+) and individuals with disabilities.

C. Funding Period:

This Call for Projects covers two funding years: FY 2019 and FY 2020. Applicants may request up to two years of funding per project. However, budget forms for proposed projects must be developed and submitted with the application.

D. Eligible Projects and Activities for Measure I Specialized Transportation Program:

Measure I funding is available for projects in the San Bernardino Valley subarea only.

Due to the limited funds currently available, capital expenditures are not eligible during this Call.

Measure I Direct-Operations Activities (Examples)

- Transportation shuttles to seniors and/or persons with disabilities
- Door-to-door and door-through-door transportation to seniors and/or persons with disabilities
- Non-emergency medical transportation services to seniors and/or persons with disabilities
- Escorted transportation to seniors and/or persons with disabilities
- Mileage reimbursement and volunteer driver programs for seniors and/or persons with disabilities

Measure I – Voucher and Buss Pass Programs (Examples)

- Voucher programs for purchased transportation to seniors and/or persons with disabilities
- Bus pass subsidies and purchase programs for public fixed-route or demand response services for seniors and/or persons with disabilities

E. Performance Measures & Monitoring:

The following performance indicators are used to measure project effectiveness. Applicants are strongly encouraged to propose additional measures by which to monitor and report project effectiveness.

1. Monthly Reporting

Recipients will be required to submit operating data for units of service delivered, persons served and selected performance measures such as Subsidy per Passenger, Subsidy per Vehicle Hour, Subsidy per Vehicle Mile, Passengers per Vehicle Hour, and Passengers per Vehicle Mile. Applicants must comply with the annual consumer satisfaction survey process required by the executed contract between Omnitrans and approved applicants.

2. Grant Recipient Meetings

Recipients of funding under this program will be required to participate in grantee meetings as required by Omnitrans. These meetings will be conducted for the purposes of encouraging and facilitating coordination between transportation programs, improving the efficiency and effectiveness of services being operated, continuing to identify gaps between services and needs for additional services and general transportation provider capacity-building.

3. Annual Financial and Compliance Audit

Each agency receiving an allocation of Measure “I” revenue shall undergo an annual financial audit performed in accordance with generally accepted auditing standards and government auditing standards issued by the Comptroller General of the United States. Compliance audits will be conducted to ensure that each agency is expending funds in accordance with the provisions and guidelines established for Measure “I” revenue.

F. Maximum/Minimum Grant Award Amounts Per Project/Per Year:

Omnitrans is specifying a maximum grant request of \$150,000 per agency under this application cycle for Measure I. The amounts requested must be appropriate to the nature of the proposed project, the benefits to be achieved and the overall cost-effectiveness of the project. Applicants should be mindful of the overall funding availability and size their projects responsibly. Omnitrans reserves the right to adjust funding awards from what is proposed or to negotiate final funding levels. Table 1 below shows the estimated annual funding levels to assist applicants in developing a scale to their project appropriate to the level of funding available to the county as a whole.

**Table 1
2018 Measure I Specialized Transportation, Available Funding for Approved Projects**

Available Funding	
FY 2018/19	FY 2019/20
Approximately \$600,000	Approximately \$600,000

G. Cost Sharing/Match Requirement:

Table 2 summarizes the local match requirements for Measure funding. The local funding requirement can be made as follows:

- Up to 70% of the total request, requiring a 30% local agency share.

Table 2

Using Measure I Funds – Local Share Funding Proportions by Project Type

Project Types	Measure I Share Request	Local Share Requirement
<u>Operations Projects (High Priority)</u> Directly-operated projects involving vehicle operations, mileage reimbursement, vouchers and bus pass subsidies.	70%	30%

E. PROJECT EVALUATION AND SCORING CRITERIA

This 2018 Call for Projects is focused on the ability of agencies and organizations to provide service to seniors and persons with disabilities that cannot currently be served by the existing transportation network. Preference will be given during the project evaluation phase to those agencies that seek out ways to coordinate with the existing transportation network and can demonstrate the ability to properly administer funds in a cost-effective manner while providing service to the target populations.

Specifically, the following criteria will be used to evaluate projects:

1. The primary focus of this Call is the provision of passenger trips, as these can be most clearly documented and concretely demonstrated by filling existing service gaps. Additionally, the cost per trip, the agency’s ability to exercise sufficient financial control, and their ability to meet program reporting standards will be important factors in the project evaluation process. (See pages 2 and 5 of the application regarding trips numbers; they should be consistent).
2. If agency transportation services are proposed, the applicant must demonstrate why the proposed services cannot be provided by existing transportation programs. (See Section III.D of the application).
3. All projects must be ***in the Coordinated Plan***, addressing the gaps or barriers identified by San Bernardino County’s 2016-2020 Plan. For eligible Measure I projects, service must be provided in the San Bernardino Valley.
4. Prospective applicants are encouraged to review available funding (see Table 1) in determining the size of their respective grant request. Omnitrans anticipates determining the number of awards to stretch funding to address as many gap areas and target population needs as may be possible. Large funding requests, if approved for funding, may be partially funded.

5. Proposals will be evaluated against the following criteria set forth in the **Public Transit-Human Services Transportation Coordination Plan for San Bernardino County, 2016/2020:**

- Adequately address the unmet/underserved and individualized transportation needs of the targeted populations.
- Demonstrate coordination efforts between public transit and human services agencies.
- Be financially sustainable and provided in a cost-effective manner.
- Include measurable goals and objectives.
- Build or increase capacity or service quality in addressing mobility needs of the target populations.
- Leverage or maximize existing transportation services and/or funding.

Section I – Agency Profile – Project Summary (10 points)

- The agency profile (Section I of application) project summary must be filled out completely, must include requested target population and trip counts and must have the budget summary calculated correctly.

Section II – Organizational Capabilities (10 points)

- Applicant must detail the characteristics of their agency and resources and identify key personnel assigned to this project and their qualifications, including resumes and certifications as supporting documentation. Applicants must demonstrate their institutional capability to carry out service delivery and reporting requirements of the proposed project.
- Applicants must describe the target population to be served and the geographic area where service will be provided.

Section III – Proposed Project Narrative (55 points)

- Applicants will be scored on their ability to clearly describe their proposed project and how the agency will deliver the proposed service.
- Proposed projects must identify and address target population(s) transportation needs, specifically in relation to Measure I Program Goals and Objectives of serving seniors and persons with disabilities.
- Applicant agencies must demonstrate how project activities directly address transportation gaps and/or barriers identified through the Coordination Plan (indicate the section/page number in the Coordinated Plan), and demonstrate why existing transportation services are not sufficient or cannot be utilized to meet identified target population needs.
- For Operations projects, the applicant must provide a well-defined operations plan that may include defined routes, schedules, current/projected ridership, key personnel, milestones and marketing strategies.
- For Voucher programs/mileage reimbursement programs, the applicant must provide an implementation plan identifying target populations, project tasks, timeframes, benchmarks, key milestones, key personnel and deliverables.

- Applicant identifies clear measurable outcome-based performance measures and indicators to track the effectiveness of the project. Applicant states the number of persons to be served, trip purpose(s), and the number of one-way passenger trips. Additional measurable units of service can also be identified. Applicant must describe the outcome (impact) that the project will have on seniors and/or individuals with disabilities.
- Proposed project is consistent with the priority of projects, as described in Chapter 6 of the Coordinated Plan.

Section IV – Coordination Statement (10 points)

- The applicant must demonstrate sufficient and appropriate coordination among and/or between public transit and human services agencies and organizations.
- Applicant should include letters of support/intent from the relevant public transit and/or human service agency/organization regarding the level of coordination.

Section V – Proposed Project Budget (15 points)

- Applicants must submit a clearly defined project budget for the two-year period on the form provided, indicating anticipated project expenditures and revenues, including documentation of matching funds.
- Applicants should provide any additional detail related to the project budget that helps reviewers understand the nature of the match, funding sources utilized in making the match, and/or any in-kind match that may be identified in the budget. A copy of the current transportation program budget should be included for existing or continuing projects.
- Applicant must provide the cost per unit of service delivered for past and current transportation programs as well as the proposed project. Applicant must submit a copy of the most recently completed agency/organization financial audit.