ACR/TDM PROGRAM
Cycle 2 – Fiscal Years 2025 and 2026

CALL FOR PROJECTS RUBRIC & SCORING GUIDE

Introduction

The evaluation rubric and scoring guide is intended to help applicants understand how their proposed submissions are likely to score based on the evaluation committee's review. Sections labeled "Qualitative" are narrative responses that the evaluation will use their best professional judgement to assign a score. A location-based GIS evaluation tool developed by the Transportation Authority will auto-calculate the metrics for sections labeled "Quantitative" separately. The "Quantitative" components are scored based on ranking all submitted projects into quartiles, not based on a direct scale. This helps prioritize the most effective strategies in relation to the projects that were submitted.

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Evaluation Rubric Summary

The section contains a high-level summary of categories, questions and points assigned. The Summary section is followed by the detailed scoring guide for each question on the application.

Need – 40%

Need addresses the five goals set in the TA's ACR/TDM Strategic Plan. Each goal contains a qualitative and quantitative assessment. Given that equity is its own category, the questioned and scoring are assessed there

Goal	Qualitative	Quantitative (Calculated by TA Online Evaluation Tool)	Points to Assign (Qual/ Quant)
Provide Congestion relief	Please explain how your project or plan provides congestion relief or reduces VMT	**Vehicles Miles Traveled (VMT):** Calculate the proportion of total VMT density of all census blocks a project boundary impacts (Source: C/CAG VMT Tool Model Data - 2020)	7/3
Increase Sustainable Transportation Options	Please explain how your project or plan will create incentives for people taking transit, bicycling, walking, carpooling, and/or using other shared-ride options over solo driving trips?	**Active Trip Potential & Proximity to High Quality Transit:** Composite calculation of the number of trips occurring less than 3 miles that could be converted to walk or bike trips (Source: MTC Travel Demand Model - 2020-2017 SCS Run) and proximity to high quality planned ReImagine SamTrans routes (Source: ReImagine SamTrans - 2022)	7/3
Promote Sustainability & Health	Please explain how your project or plan will enhance health or safety	**Pollution Burden and Cardiovascular Disease:** Composite calculation of the average Pollution Burden and Cardiovascular Disease Percentile scores of all census blocks a project boundary impacts (Source: CalEnviroScreen 4.0)	7/3
Encourage Economic Development Opportunities	Please explain how your project or plan improve access to employment, job centers, business districts or retail opportunities	**Priority Development Areas (PDAs):** Calculate the proportion a project boundary overlapping with MTC PDAs (Source: MTC Priority Development Areas)	7/3
Invest Funding Equitably	Please explain how your project or plan would address the needs of historically underserved populations	**Equity Priority Areas (EPAs)**: Calculate the proportion a project boundary overlaps with SamTrans EPA (Source: ReImagine SamTrans – 2022)	Points assigned in Equity section

Effectiveness – 25%

Question	Points to Assign
Is this project identified in a local, countywide or regional planning document? If so please identify which one	5
How do you propose to evaluate the success of the project?	15
Benefit relative to the amount of funding requested (high impact, low cost projects – "bang for the buck")	5

Equity – 25%

Question	Points to Assign
Does the project's geographic extent fall within SamTrans EPA?	10
Please describe how the project/program considers equity under at least one user-based equity framing below BONUS: Speak to more than one framing	15 +3
BONUS: Are there potential negative impacts for historically marginalized communities? If so, how do you plan for any mitigation of these impacts? Negative impacts could include (as examples) – construction impacts, pollution impacts, increased travel costs, etc.	0 [low as -2]

Readiness – 5%

Question	Points to Assign
Clear and complete proposal	1
Demonstrates stakeholder support/community engagement	2
Project status and schedule	1
Project has a credible cost estimate and funding plan	1

Funding Leverage – 40%

Question	Points to Assign
Project meets local match percentage	5
BONUS: Is there any private sector contribution, such as public private partnership?	+1

Bonus – Project with TDM Plan

The TA is looking to promote the creation and adoption of TDM-related plans that help provide a guidance on efforts local agencies could be leading. To encourage the development of these, the TA is

offering five (5) bonus points for agencies that have adopted TDM Plans. If the project sponsor already has a TDM plan in place, the bonus will be provided to the project

Scoring Summary

Category	Points to Assign
Need	40
Effectiveness	25
Equity	25
Readiness	5
Funding Leverage	5
Total	**100**
BONUS	
Equity	3
Funding Leverage	1
Project Type	5
Total Feasible	**108**

SCORING GUIDE

NEED

Congestion Relief

Qualitative: Please explain how your project or plan provides congestion relief or reduces VMT		
Criteria	Scoring Instructions	Points to Assign
Full Credit	Application **clearly** and **convincingly** demonstrates how the project or plan will provide congestion relief or reduce VMT. Specific and reliable best practice sources are provided to back up claims.	7
Partial Credit - Higher	Application **clearly and convincingly** explains how the project or plan will provide congestion relief or reduce VMT but does not provide sources to back up claims.	5
Partial Credit - Lower	Application **somewhat** explains how the project or plan will provide congestion relief or reduce VMT. Sources are unmentioned or, if provided, are irrelevant to back up argument.	3
No Credit	Application **does not clearly** explain the relation between the project and VMT reduction.	0

Quantitative - Vehicles Miles Traveled (VMT): Calculate the proportion of total VMT density of all census blocks a project boundary impacts (Source: C/CAG VMT Tool Model Data - 2020)		
Criteria	Scoring Instructions	Points to Assign
Full Credit	The proportional VMT density calculated for the proposed project is in the Top 25th percentile (4th quartile) compared to all other submitted project applications.	3
Partial Credit - Higher	The proportional VMT density calculated for the proposed project is in the 51-75th percentile (3rd quartile) compared to all other submitted project applications.	2
Partial Credit - Lower	The proportional VMT density calculated for the proposed project is in the 26-50th percentile (2nd quartile) compared to all other submitted project applications.	1
No Credit	The proportional VMT density calculated for the proposed project is in the 0-25th percentile (1st quartile) compared to all other submitted project applications.	0

Increase Sustainable Transportation Options

Qualitative: Please explain how your project or plan will create incentives for transit, bicycle, pedestrian, carpooling, and other shared-ride options over driving alone?		
Criteria	Scoring Instructions	Points to Assign
Full Credit	Application **clearly** and **convincingly** explains how the project will incentivize the use of **multiple modes** other than driving-alone to encourage connected, seamless mobility. Specific and reliable best practice sources are provided to back up claims.	7
Partial Credit - Higher	Application **clearly** and **convincingly** explains how the project will incentivize **a singular mode** other than driving-alone. Specific and reliable best practice sources are provided to back up claim.	5
Partial Credit - Lower	Application **somewhat** explains how the project will incentivize at least one mode other than driving-alone. Sources are unmentioned or, if provided, are irrelevant to back up argument.	3
No Credit	Application **does not clearly** explain how the project will incentivize modes other than driving-alone.	0

Quantitative - Active Trip Potential & Proximity to High Quality Transit: Composite calculation of the number of trips occurring less than 3 miles that could be converted to walk or bike trips (Source: MTC Travel Demand Model - 2020-2017 SCS Run) and proximity to high quality planned ReImagine SamTrans routes (Source: ReImagine SamTrans - 2022)		
Criteria	Scoring Instructions	Points to Assign
Full Credit	The active trip potential and proximity to high quality transit composite calculation for the proposed project is in the Top 25th percentile (4th quartile) compared to all other submitted project applications.	3
Partial Credit - Higher	The active trip potential and proximity to high quality transit composite calculation for the proposed project is in the 51-75th percentile (3rd quartile) compared to all other submitted project applications.	2
Partial Credit - Lower	The active trip potential and proximity to high quality transit composite calculation for the proposed project is in the 26-50th percentile (2nd quartile) compared to all other submitted project applications.	1
No Credit	The active trip potential and proximity to high quality transit composite calculation for the proposed project is in the 0-25th percentile (1st quartile) compared to all other submitted project applications.	0

Promote Sustainability & Health

Qualitative: Please explain how your project or plan will enhance health or safety		
Criteria	Scoring Instructions	Points to Assign
Full Credit	Application **clearly** and **convincingly** explains how the project or plan could enhance health or safety. Health can range from environmental benefits to human activity. When discussing safety, applicant prioritizes the needs of vulnerable road users (bicyclists and pedestrians), not only drivers. Specific and reliable best practice sources, such as crash modification factors, are provided to back up claims.	7
Partial Credit - Higher	Application **clearly** and **convincingly** explains how the project or plan could enhance health or safety but does not provide sources to back up claims. Health can range from environmental benefits to human activity.	5
Partial Credit - Lower	Application **somewhat** explains how the project or plan could enhance health or safety. Health could refer to pollution, getting active or both. Sources are unmentioned or, if provided, are irrelevant to back up argument.	3
No Credit	Application **does not clearly** explain how the project or plan could enhance health or safety.	0

Quantitative - Pollution Burden and Cardiovascular Disease: Composite calculation of the average Pollution Burden and Cardiovascular Disease Percentile scores of all census blocks a project boundary impacts (Source: CalEnviroScreen 4.0)		
Criteria	Scoring Instructions	Points to Assign
Full Credit	The pollution burden and cardiovascular disease composite calculation for the proposed project is in the Top 25th percentile (4th quartile) compared to all other submitted project applications.	3
Partial Credit - Higher	The pollution burden and cardiovascular disease composite calculation for the proposed project is in the 51-75th percentile (3rd quartile) compared to all other submitted project applications.	2
Partial Credit - Lower	The pollution burden and cardiovascular disease composite calculation for the proposed project is in the 26-50th percentile (2nd quartile) compared to all other submitted project applications.	1
No Credit	The pollution burden and cardiovascular disease composite calculation for the proposed project is in the 0-25th percentile (1st quartile) compared to all other submitted project applications.	0

Encourage Economic Development Opportunities

Qualitative: Please explain how your project or plan will improve access to employment, job centers, business districts or retail opportunities		
Criteria	Scoring Instructions	Points to Assign
Full Credit	Application **clearly** and **convincingly** explains how the project will improve access to employment, job centers, business districts or retail opportunities. Specific and reliable best practice sources or relevant data are provided to back up claims.	7
Partial Credit - Higher	Application **clearly** and **convincingly** explains how the project will improve access to employment, job centers, business districts or retail opportunities but does not provide sources or data to back up claims.	5
Partial Credit - Lower	Application **somewhat** explains how the project will improve access to employment, job centers, business districts or retail opportunities. Sources are unmentioned or, if provided, are irrelevant to back up argument.	3
No Credit	Application **does not clearly** explain how the project will improve access to employment, job centers, business districts or retail opportunities.	0

Quantitative - Priority Development Areas (PDAs): Calculate the proportion a project boundary overlapping with MTC PDAs (Source: MTC Priority Development Areas)		
Criteria	Scoring Instructions	Points to Assign
Full Credit	The proportional overlap with a PDA calculated for the proposed project is in the Top 25th percentile (4th quartile) compared to all other submitted project applications.	3
Partial Credit - Higher	The proportional overlap with a PDA calculated for the proposed project is in the 51-75th percentile (3rd quartile) compared to all other submitted project applications.	2
Partial Credit - Lower	The proportional overlap with a PDA calculated for the proposed project is in the 26-50th percentile (2nd quartile) compared to all other submitted project applications.	1
No Credit	The proportional overlap with a PDA calculated for the proposed project is in the 0-25th percentile (1st quartile) compared to all other submitted project applications.	0

EFFECTIVENESS

How do you propose to evaluate the success of the project?		
Criteria	Scoring Instructions	Points to Assign
Full Credit	Thoughtfully articulates how success will be measured including potential ways to calculate Vehicle Miles Traveled (VMT) or greenhouse gas (GHG) emissions reductions. Sets goals or metrics to monitor project success and learn lessons, particularly for pilots.	15
Partial Credit - Higher	Thoughtfully articulates how success will be measured with potential metrics. Does not provide a way to calculate VMT or GHG emission reductions.	10
Partial Credit - Lower	Some articulation of project success. Metrics to monitor are unmentioned.	5
No Credit	Is not able to articulate how a successful project is measured. Metrics to monitor are either unmentioned or irrelevant.	0

Project recognized in adopted statewide, regional, county or local planning and fund programming documents		
Criteria	Scoring Instructions	Points to Assign
Full Credit	Project/program is specifically identified in an adopted state, regional, or countywide plan.	5
Partial Credit - Higher	Project/program is identified as a high priority in a local TDM or planning document.	4
Partial Credit - Middle	Project/program is specifically identified in in a local TDM or planning document but is not listed as a high priority.	3
Partial Credit - Lower	Application **clearly** and **convincingly** describes how the project/program is consistent with goals listed in an adopted planning document (General Plans, Specific Plans, Climate Action Plans, etc.).	1
No Credit	None of the above conditions were met or application did not answer question.	0

Benefit relative to the amount of funding requested (high impact, low-cost projects – "bang for the buck")		
Criteria	Scoring Instructions	Points to Assign
Full Credit	Application **clearly and convincingly** explains how the project provides a benefit relative to the amount of funding requested. High-cost projects should discuss safety and mobility benefits that cannot be accomplished by less expensive solutions or life-cycle cost savings due to reduced maintenance/operations costs.	5
Partial Credit - Higher	Applicant **somewhat** explains benefit relative to the amount of funding request and demonstrates a high amount of community benefit.	3
Partial Credit - Lower	Applicant **somewhat** explains benefit relative to the amount of funding request and demonstrates a low amount of community benefit or hyper localized benefit to relatively few community members.	1
No Credit	Application **does not clearly** explain how the project provides a benefit relative to the amount of funding requested.	0

EQUITY

Equity Framings

Equity can be complicated first by how to define it as well as who is included and who is not. Transportation equity for this application is measured two ways: location-based and user-based equity. Location-based estimates focus on populations, benefits and costs by geography, typically using concentration approach at the census tract level. If a project overlaps a tract/area with a high concentration of the target population, it is assumed to benefit them. One advantage to this method is that it tends to be easy to assess in GIS.

A user-based approach starts with the recognition that not everyone can use the system the same way. Target groups using this type of analysis may include older adults and people with disabilities or low-income households (who may or may not live in an area of high concentration of low-income households). This is better assessed qualitatively for this program.

Location-based framing focuses on geographic concentration of priority populations. Two such measures used in the region are MTC's Equity Priority Communities (EPCs) and SamTrans' Equity Priority Areas (EPAs). The TA will provide a tool to calculate the value requested below

Quantitative - Equity Priority Areas (EPAs):
Calculate the proportion a project boundary overlaps with a SamTrans EPA (Source: ReImagine SamTrans – 2022)

Criteria	Scoring Instructions	Points to Assign
Full Credit	The proportional overlap with a SamTrans EPA calculated for the proposed project is in the Top 25th percentile (4th quartile) compared to all other submitted project applications. A citywide project or program will not be eligible for full credit.	10
Partial Credit - Higher	The proportional overlap with a SamTrans EPA calculated for the proposed project is in the 51-75th percentile (3rd quartile) compared to all other submitted project applications. A citywide project or program will not be eligible for partial-higher credit.	5
Partial Credit - Lower	The proportional overlap with a SamTrans EPA calculated for the proposed project is in the 26-50th percentile (2nd quartile) compared to all other submitted project applications. IF a citywide project, the project or program demonstrates how will address the SamTrans EPAs.	3
No Credit	The proportional overlap with a SamTrans EPA calculated for the proposed project is in the 0-25th percentile (1st quartile) compared to all other submitted project applications. IF a citywide project, no SamTrans EPAs are located or targeted in the jurisdiction.	0

User-based: Equity can cover a spectrum of needs and evaluated several ways. Even with a focus on equity among users, there are many ways to frame equity and who is being targeted. Rather than the TA picking a single framing, the applicant is invited to highlight how their project will enhance equity across multiple framings. Three equity framings are provided to the applicant along with an "Other":

1. ***Progressive with respect to income*** - This reflects whether a strategy increases Transportation Affordability and makes lower-income households better or worse off.
2. ***Benefits transportation disadvantaged*** - This reflects whether a strategy makes people who are transportation disadvantaged (which could include among others low-income households, people with disabilities, older adults, non-traditional shift workers, or other

vulnerable populations) better off by increasing their travel options or providing financial savings.

3. ***Improves <u>Basic Access</u>*** - This reflects whether a strategy favors more important transport (emergency response,commuting, essential shopping) over less important transport.

4. ***Other***

Please describe how the project/program considers equity under at least one user-based equity framing below

Criteria	Scoring Instructions	Points to Assign
Full Credit +BONUS	Refers to at least two of the equity framings. Thoughtfully articulates how project addresses the needs of one or more groups: low- income users, people of color, people with disabilities, older adults, non-traditional shift workers or other vulnerable populations.	18
Full Credit	Refers to at least one of the equity framings. Thoughtfully articulates how project addresses the needs of one or more groups: low- income users, people of color, people with disabilities, older adults, non-traditional shift workers or other vulnerable populations.	15
Partial Credit - Higher	Refers to at least one of the equity framings. Articulates how project addresses the needs of one or more groups: low- income users, people of color, people with disabilities, older adults, non-traditional shift workers or other vulnerable populations. However, argument may be unconvincing or lack additional context.	12
Partial Credit - Middle	Refers to at least one of the equity framings. Articulates how project addresses the needs of one or more groups: low- income users, people of color, people with disabilities, older adults, non-traditional shift workers or other vulnerable populations. However, argument may be unconvincing or lack additional context.	8
Partial Credit - Lower	Refers to at least one of the equity framings. Articulates how project addresses the needs of one or more groups: low- income users, people of color, people with disabilities, older adults, non-traditional shift workers or other vulnerable populations. However, argument may be unconvincing or lack additional context.	4
No Credit	Application is missing required information or incomplete.	0

	BONUS Are there potential negative impacts for historically marginalized communities? If so, do you plan for any mitigation of these impacts? *Negative impacts could include (as examples) – construction impacts, pollution impacts, increased travel costs*	
Criteria	Scoring Instructions	Points to Assign
Full Credit	One of the following must be met: 1. Sponsor identifies no potential negative impacts and evaluators agree. 2. Describes potential negative impacts for "historically marginalized communities" which MAY refer to among other groups – low- income users, people of color, people with disabilities, limited English speakers. Also describes at least one mitigation satisfactorily.	0
Negative Credit	One of the following must be met: 1. Sponsor identifies no potential negative impacts and evaluators disagree. 2. Describes potential negative impacts for "historically marginalized communities" which MAY refer to among other groups – low- income users, people of color, people with disabilities, limited English speakers. Does NOT detail at least one mitigation satisfactorily.	-2

READINESS

Clear and complete proposal		
Criteria	Scoring Instructions	Points to Assign
Full Credit	Application is complete and not missing any information or required attachments.	1
No Credit	Application is missing required information or incomplete.	0

Demonstrates stakeholder support/community engagement		
Criteria	Scoring Instructions	Points to Assign
Full Credit	Application **clearly** and **convincingly** explains how the community has been and will be engaged in the project. The project will engage a diverse set of stakeholders using outreach best practices.	2
Partial Credit	Application explains how the community has been engaged in prior related work.	1
No Credit	Application **does not** explain how the community has been and will be engaged in the project.	0

Project status and schedule		
Criteria	Scoring Instructions	Points to Assign
Full Credit	All the following must be met: 1. Project is proposed to start within one (1) year of anticipated award date AND 2. Project schedule is **adequate and appropriate** to the type of project described in the application and can be completed within two years.	1
No Credit	Project schedule is NOT adequate or appropriate to the type of project described in the application.	0

FUNDING LEVERAGE

Percent of matching funds		
Criteria	Scoring Instructions	Points to Assign
Full Credit	Local match percentage is equal to more than 50% or more (25% with Equity reduction)	5
Partial Credit - Higher	Local match percentage is equal to 25-49% (12.5%-24% with Equity reduction)	4
Partial Credit – Middle High	Local match percentage is equal to 15-24% (7.5%-12.4% with Equity reduction)	3
Partial Credit – Middle Low	Local match percentage is equal to 11-14% (5.1-7.4% with Equity reduction)	2
Partial Credit - Lower	Local match percentage is equal to 10% (5% with Equity reduction)	1
No Credit	Local match is less than 10% (5% with Equity reduction)	Disqualified

BONUS: Private sector contribution, including public/private partnerships		
Criteria	Scoring Instructions	Points to Assign
Full Credit	Private sector contribution to local match is given (in any amount)	+1
No Credit	No private sector funding is part of this project application.	0

PROJECT BONUS

BONUS: Extra credit for encouraged plans		
Criteria	Scoring Instructions	Points to Assign
Full Credit	IF PLAN: Application is to complete a TDM Plan IF PROJECT: Applicant already has a TDM Plan	+5
No Credit	Another type of plan or project	0