

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.

Primary TA Contact Information

Sue-Ellen Atkinson, Manager of Planning & Fund Management Email: <u>atkinsons@samtrans.com</u> Phone: 650-508-6211

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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 | 15 |
| least one user-based equity framing below | |
| BONUS: Speak to more than one framing | |
| | +3 |
| BONUS: Are there potential negative impacts for historically | 0 [low as -2] |
| 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. | |

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 | +1 |
| private partnership? | |

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 |
| | |



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 25 th percentile (4 th quartile) compared to all other submitted project applications. | 3 |
| Partial Credit - Higher | The proportional VMT density calculated for the proposed project is in the 51-75 th percentile (3 rd quartile) compared to all other submitted project applications. | 2 |
| Partial Credit - Lower | The proportional VMT density calculated for the proposed project is in the 26-50 th percentile (2 nd quartile) compared to all other submitted project applications. | 1 |
| No Credit | The proportional VMT density calculated for the proposed project is in the 0-25 th percentile (1 st 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 25 th percentile (4 th 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 51-75 th percentile (3 rd 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 26-50 th percentile (2 nd 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 0-25 th percentile (1 st quartile) compared to all other submitted project applications. | 0 |

Promote Sustainability & Health





| ority | | | |
|-------------------------|--|-----------|--|
| Qualitative: Please exp | 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 | 7 | |
| | 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. | | |
| Partial Credit - Higher | Application clearly and convincingly explains how the | 5 | |
| | 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. | | |
| Partial Credit - Lower | Application somewhat explains how the project or plan | 3 | |
| | 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. | | |
| No Credit | Application does not clearly explain how the project or | 0 | |
| | plan could enhance health or safety. | | |

| 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 25 th percentile (4 th 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 51-75 th percentile (3 rd 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 26-50 th percentile (2 nd 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 0-25 th percentile (1 st 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 25 th percentile (4 th 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 51-75 th percentile (3 rd 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 26-50 th percentile (2 nd 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 0-25 th percentile (1 st 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



| SamTrans – 2022) Criteria | Scoring Instructions | Points to |
|------------------------------|--|--------------|
| Full Credit | The proportional overlap with a SamTrans EPA calculated for the proposed project is in the Top 25 th percentile (4 th quartile) compared to all other submitted project applications. A citywide project or program will not be eligible for full credit. | Assign 10 |
| Partial Credit - Higher | The proportional overlap with a SamTrans EPA calculated for the proposed project is in the 51-75 th percentile (3 rd 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 26-50 th percentile (2 nd 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 0-25 th percentile (1 st 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 <u>Transportation Affordability</u> 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



| ority | | |
|---|----------------------|-----------|
| Please describe how the project/program considers equity under at least one user-based equity | | |
| framing below | | |
| Criteria | Scoring Instructions | Points to |

| 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: Sponsor identifies no potential negative impacts and evaluators agree. 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: Sponsor identifies no potential negative impacts and evaluators disagree. 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 |



| 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 |



| 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 | | |