



SAN MATEO COUNTY

**Transportation
Authority**

C/CAG

City/County Association of Governments
of San Mateo County

San Mateo County Shuttle Program Call for Projects Workshop

December 18, 2017 1:30 PM

SamTrans 4th Floor

Dining Conference Room



Presentation Overview

- **San Mateo County Shuttle Program**
- **Eligibility**
- **Process**
- **New Funding Match Requirement**
- **Evaluation Criteria**
- **Schedule**
- **Tools, Application/Reference Material & Contacts**



Program Overview

- **San Mateo County Shuttle Program:
Joint TA & C/CAG Call for Projects**
 - **TA Measure A Local Shuttle Program**
 - **C/CAG Local Transportation Services Shuttle Program**
- **Program purpose: provide matching funding for the operation of local shuttle services**
- **Eligible costs include operations, marketing & administration of shuttles**



What Type of Service does the Shuttle Program Fund?



- **Purpose:** Fill gaps in regular bus service (route & time)
- **Commuter shuttles:** provide first/last mile peak commute link to/from regional transit primarily to access employment centers
- **Community shuttles:** provide all, mid-day or weekend service generally within a community for basic needs (e.g. shopping, dining, medical), often serving the transit-dependent
 - **Door to door shuttles:** special type of community shuttle providing direct point to point service by advance reservation not on a regular scheduled route



Key Eligibility Requirements

- **Sponsor must be a public agency**
- **Serves county residents & employees**
- **Provides access to regional transit and/or meets local mobility needs**
- **Open to public & ADA compliant**
- **Funds are to supplement, not supplant other funding sources**
- **SamTrans concurrence letter required**
- **Governing board resolution required**
- **Sponsors required to receive technical assistance for shuttles not meeting benchmarks**



Process

- **Call for Projects released Dec. 18, 2017**
 - **Covers Fiscal Years 2019 & 2020**
 - Up to \$9.0 million from TA Measure A**
 - Up to \$1.0 million from C/CAG**
 - Up to \$10.0 million total funds available**
- **One application process, one staff evaluation panel**
- **Funds awarded, agreements executed**
- **Quarterly/Annual reporting required on financials, service & performance**





Funding Match Requirement

- **Prior joint funding calls - minimum 25% match requirement**
- **New match requirement implements SamTrans Mobility Management Plan strategy to improve cost effectiveness for underperforming routes**
- **Based on operating cost/passenger for FY2017 or latest 12 months at the time sponsor submits application**



Funding Match Requirement

Tier 1: Minimum 25% match

- All new shuttles and existing shuttles in operation for less than 2 full years
- Shuttles operating for 2 full years or more that either meet or are within a range that is no worse than 50% of the operating cost/passenger benchmark

Tier 2: Minimum 50% match

- Shuttles operating for 2 full years or more that miss the operating cost/passenger benchmark by 50% or more... “50/50 Rule”



Performance Benchmarks

Operating/Cost Passenger Benchmark Adjusted for Increase in CPI for 2017

Shuttle Service Type	Prior CFP Operating Cost/Passenger Benchmark	Current CFP Operating Cost/Passenger Benchmark
Commuter	\$7/passenger	\$8/passenger
Community	\$9/passenger	\$10/passenger
Door to Door	\$18/passenger	\$20/passenger

Operating Cost/Passenger Benchmark & Threshold for Minimum 50% Match

Shuttle Service Type	Operating Cost/Passenger Benchmark	Threshold for minimum 50% match requirement
Commuter	\$8/passenger	≥ \$12/passenger
Community	\$10/passenger	≥ \$15/passenger
Door to Door	\$20/passenger	≥ \$30/passenger



Evaluation Criteria

	<u>Existing Shuttles</u>	<u>New Shuttles</u>
• Need:	20%	25%
• Readiness:	20%	25%
• Effectiveness:	25%	15%
• Funding Leverage:	20%	20%
• Policy Consistency & Sustainability:	15%	15%



Evaluation Criteria: Need & Readiness

Prioritization Criteria Category		Detailed Criteria
Need & Readiness Existing shuttles – 40% New shuttles – 50%	Project Need Existing shuttles - 20% New shuttles – 25%	<ul style="list-style-type: none"> • Provides service to an area underserved by transit • Provides congestion relief • Provides service to special populations (e.g. transit dependent, seniors) • Stakeholder support
	Project Readiness Existing shuttles - 20% New shuttles – 25%	<ul style="list-style-type: none"> • Solid service plan describing how service will be delivered for the funding period* - Describe any actions/modifications from receipt of technical assistance • Solid funding plan to deliver the service

*Sponsors must describe their marketing plan, as part of the service plan to be considered for funding, otherwise the application will be considered incomplete



Evaluation Criteria: Effectiveness

Prioritization Criteria Category	Detailed Criteria
<p>Effectiveness</p> <p>Existing shuttles – 25%</p> <p>New shuttles – 15%</p>	<ul style="list-style-type: none"> • Annual operating cost/passenger for past 12 months (FY2017 or latest available data) for existing shuttles, or projected if new shuttles • Annual passengers/service hour for past 12 months (FY2017 or latest available data) for existing shuttles, or projected if new shuttles • Shuttle links w/ other fixed route transit (more points for higher ridership routes) • Improves access from TOD to major activity centers • Reduces single occupant vehicle (SOV) trips & vehicle miles traveled (VMT)

Effectiveness Benchmarks:

Service Type	Operating Cost/Passenger	Passengers/Service Hour
Commuter	\$8	15
Community	\$10	10
Door to Door	\$20	2



Evaluation Criteria: Funding Leverage

Prioritization Criteria Category	Detailed Criteria								
Funding Leverage – 20%	Percentage of matching funds contribution: <table data-bbox="795 696 1858 913"><tr><td data-bbox="795 696 1255 782"><u>Shuttles w/ min. 25% match requirement</u></td><td data-bbox="1263 696 1858 782"><u>Shuttles w/ min. 50% match requirement</u></td></tr><tr><td data-bbox="795 788 1255 828">25% to <50% - 5 to 10 pts</td><td data-bbox="1263 788 1858 828">50% to <75% - 10 to 15 pts</td></tr><tr><td data-bbox="795 833 1255 873">50% to <75% - 10 to 15 pts</td><td data-bbox="1263 833 1858 873">75% to <100% - 15 to 18 pts</td></tr><tr><td data-bbox="795 879 1255 913">75% to <100% - 15 to 18 pts</td><td></td></tr></table> <p data-bbox="1043 956 1613 992">Up to 2 pts for private sector funding</p>	<u>Shuttles w/ min. 25% match requirement</u>	<u>Shuttles w/ min. 50% match requirement</u>	25% to <50% - 5 to 10 pts	50% to <75% - 10 to 15 pts	50% to <75% - 10 to 15 pts	75% to <100% - 15 to 18 pts	75% to <100% - 15 to 18 pts	
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Evaluation Criteria: Policy Consistency & Sustainability

Prioritization Criteria Category	Detailed Criteria
Policy Consistency & Sustainability – 15%	<ul style="list-style-type: none">• Shuttle is included in an adopted local, specific area, county or regional plan• Supports jobs & housing growth/economic development• Use of clean fuel vehicle(s) for service• Accommodation for bicycles



Schedule

Timeline	Activity
Dec. 18, 2017	Call for Projects released
Dec. 18, 2017	Call for Projects workshop
Jan. 12, 2018	Date for sponsors to initiate contact for required concurrence letter and technical assistance
Feb. 9, 2018	Applications due to the TA by 4:00pm, submit 1 original, 7 hard copies & 1 electronic copy
March 2018	Panel evaluation of applications
April 2018	Informational item to TA CAC and TA Board on draft Program of Projects, presentations to C/CAG TAC & CMEQ committee
May 3, 2018	TA Board approves proposed Program of Projects
May 10, 2018	C/CAG Board approves proposed Program of Projects



Helpful Tools

Shuttle Efficiency Template

Input requested data into the blue cells.

Output is automated in the orange cells.

	Based on Service Day	Monthly Estimate	Annual Estimate	FUNDING	TA-C/CAG Grant Request	Match (Sponsor Contribution)												
Enter the Quantity of Service Days:		21	255	Enter Desired Grant Request %:	75%													
Enter Average Hourly Service Rate (include all related vendor expenses):	\$75.00				\$114,750.00	\$38,250.00												
Enter Average Daily Service Hour Quantity:	8.00	-	2,040.00	Cost/Passenger	TA-C/CAG Grant Subsidy/Passenger	Sponsor Subsidy/Passenger												
Enter Projected Average Daily Ridership:	80	-	20,400	\$7.50	\$5.63	\$1.88												
Projected Service Cost:	\$600.00	\$12,600.00	\$153,000.00	BENCHMARK TARGETS <table border="1"> <thead> <tr> <th>Service Type</th> <th>Cost/Passenger</th> <th>Pass. /Serv. Hr.</th> </tr> </thead> <tbody> <tr> <td>Commuter</td> <td>\$8.00</td> <td>15</td> </tr> <tr> <td>Community</td> <td>\$10.00</td> <td>10</td> </tr> <tr> <td>Door-to-Door</td> <td>\$20.00</td> <td>2</td> </tr> </tbody> </table>			Service Type	Cost/Passenger	Pass. /Serv. Hr.	Commuter	\$8.00	15	Community	\$10.00	10	Door-to-Door	\$20.00	2
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Commuter	\$8.00	15																
Community	\$10.00	10																
Door-to-Door	\$20.00	2																
Projected Support Costs (e.g. admin, marketing):		\$0.00	\$0.00															
Projected Cost per Passenger:	\$7.50																	
Projected Passengers per Service Hour:	10.0																	



Helpful Tools

Reduced Vehicle Miles Traveled (VMT) Template			
<i>Input requested data in blue cells.</i>		<i>Output is automated on orange cells</i>	
	Based on Service Day	Monthly Estimate	Annual Estimate
Service Days per Period:		21	255
Enter the Average <u>Daily</u> Shuttle Service Hr Miles (posted schedule; all inclusive miles):	150.0	-	38,250.0
Enter the Average <u>Daily</u> Shuttle Deadhead Miles (Yard to/from the schedule):	15.0	-	3,825.0
Average Passengers per Period:	80	-	20,400
Enter Passengers' Average One-Way Trip Mileage (Origin to destination one-way driving distance; from survey data):	9.8	-	2,486.3
Total Shuttle Miles (Service hr plus deadhead):	165.0	-	42,075.0
Avg. Passenger Trip Miles (Origin to Destination):	780.0	-	198,900.0
Total Reduced VMT (Total Avg. Passenger Trip Miles minus Total Shuttle Miles):	615.0	-	156,825.0
*Origin to Destination (e.g. home to work)			



Application & Reference Material

Call for Projects

www.smcta.com/Projects/Call_for_Projects.html

www.ccag.ca.gov/opportunities/call-for-projects/

Shuttle Technical Assistance Workshop Presentation

http://www.smcta.com/Assets/SanMateoCountyShuttleWorkshop_2017.pdf



C/CAG

City/County Association of Governments
of San Mateo County

Call for Projects Contacts

- **General Application Questions**

Joel Slavit - TA
- (650) 508-6476

Jennifer Williams - TA
- (650) 508-6343

Susy Kalkin- C/CAG
- (650) 599-1467

- slavitj@samtrans.com - williamsj@samtrans.com - kkalkin@smcgov.org

- **Contacts for Concurrence Letter & Technical Assistance**

Concurrence Letter & Technical Assistance for Community Shuttles

Patrick Blankenship – SamTrans

- (650) 508-6457

- blankenship@samtrans.com

Technical Assistance for Commuter Shuttles

John Ford – Commute.org

- (650) 588-8170

- shuttles@commute.org