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Allen Lawson, *San Pasqual*  
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Kim Kawada  
Chief Deputy Executive Director, **SANDAG**



# TRANSPORTATION COMMITTEE AGENDA

Friday, May 4, 2018  
9 a.m. to 12 noon  
SANDAG Board Room  
401 B Street, 7th Floor  
San Diego

## AGENDA HIGHLIGHTS

- **TRANSPORTATION PROJECT COST ESTIMATING PROCESS**
- **SPECIALIZED TRANSPORTATION GRANT PROGRAM: UPDATE ON CYCLE 10 CALL FOR PROJECTS**
- **2018 STATE HIGHWAY OPERATION AND PROTECTION PROGRAM**

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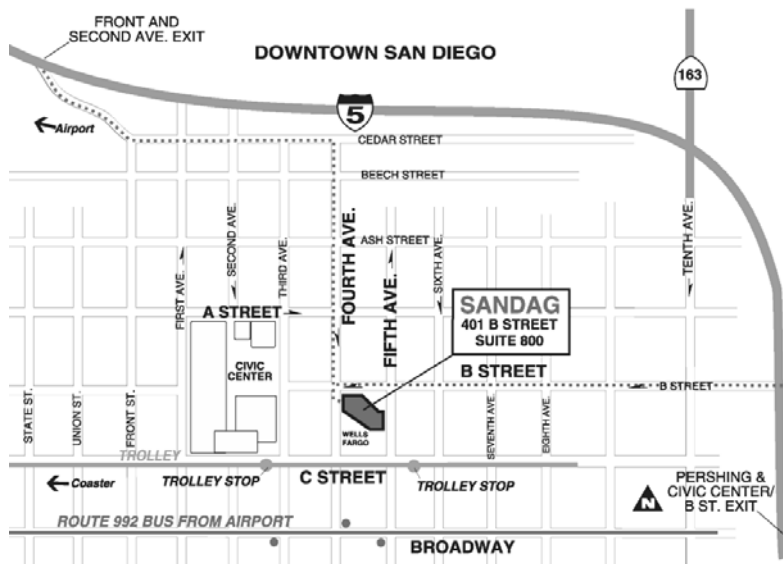
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# TRANSPORTATION COMMITTEE

Friday, May 4, 2018

ITEM NO.		RECOMMENDATION
+1.	<b>APPROVAL OF MEETING MINUTES</b>  The Transportation Committee is asked to review and approve the minutes from its April 20, 2018, meeting.	APPROVE
2.	<b>PUBLIC COMMENTS/COMMUNICATIONS/MEMBER COMMENTS</b>  Members of the public shall have the opportunity to address the Transportation Committee on any issue within the jurisdiction of the Committee that is not on this agenda. Anyone desiring to speak shall reserve time by completing a "Request to Speak" form and giving it to the Clerk prior to speaking. Public speakers should notify the Clerk if they have a handout for distribution to Committee members. Public speakers are limited to three minutes or less per person. Committee members also may provide information and announcements under this agenda item.	
<b>REPORTS</b>		
+3.	<b>TransNet SMART GROWTH INCENTIVE PROGRAM: FUNDING RECOMMENDATION FOR CLIMATE ACTION PLANS AND COMPLETE STREETS POLICY GRANTS (Carolina Ilic)</b>  The Transportation Committee is asked to recommend that the Board of Directors approve the proposed funding recommendation for the City of El Cajon Climate Action Plan grant, funded through the <i>TransNet</i> Smart Growth Incentive Program.	RECOMMEND
+4.	<b>TRANSPORTATION PROJECT COST ESTIMATING PROCESS (Jim Linthicum; Allan Kosup, Caltrans)</b>  An overview will be provided of transportation project cost estimating practices, challenges in managing cost changes, and how changes in cost estimates are communicated with decision-makers.	INFORMATION
+5.	<b>SPECIALIZED TRANSPORTATION GRANT PROGRAM: UPDATE ON CYCLE 10 CALL FOR PROJECTS (Audrey Porcella)</b>  The Transportation Committee is asked to provide feedback on potential changes to the Specialized Transportation Grant Program evaluation criteria and program requirements.	DISCUSSION
+6.	<b>FIXING AMERICA'S SURFACE TRANSPORTATION ACT: CONGESTION MITIGATION AND AIR QUALITY PERFORMANCE MANAGEMENT TARGETS (Rachel Kennedy)</b>  The Transportation Committee is asked to provide direction on the Congestion Mitigation and Air Quality performance management targets required by the Fixing America's Surface Transportation Act.	DISCUSSION

**+7. 2018 STATE HIGHWAY OPERATION AND PROTECTION PROGRAM (Dawn Vettese; Joe Hull, Caltrans)**

**INFORMATION**

Staff will provide an overview of the 2018 State Highway Operation and Protection Program, which includes nearly \$540 million in funding for projects in the San Diego region.

**8. CONTINUED PUBLIC COMMENTS**

If the five speaker limit for public comments was exceeded at the beginning of this agenda, other public comments will be taken at this time. Subjects of previous agenda items may not again be addressed under public comment.

**9. UPCOMING MEETINGS**

**INFORMATION**

The next meeting of the Transportation Committee is scheduled for Friday, May 18, 2018, at 9 a.m.

**10. ADJOURNMENT**

+ next to an agenda item indicates an attachment



**TRANSPORTATION COMMITTEE  
MAY 4, 2018**

**ACTION REQUESTED: DISCUSSION**

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**SPECIALIZED TRANSPORTATION GRANT PROGRAM:  
UPDATE ON CYCLE 10 CALL FOR PROJECTS**

File Number 3320200

**Introduction**

The SANDAG Specialized Transportation Grant Program (STGP) funds projects and programs that expand mobility options for seniors and individuals with disabilities. In preparation for the next call for projects, anticipated to be released in summer 2018, staff presented for discussion the draft program goal and objectives to the Transportation Committee on January 19, 2018, and to the Independent Taxpayer Oversight Committee (ITOC) on February 14, 2018. The Transportation Committee and the ITOC also discussed minimum and maximum grant request amounts and the Senior Mini-Grant match requirement. On February 28, 2018, SANDAG hosted a workshop with current grantees and past applicants. In addition to discussing the draft program goal and objectives, minimum and maximum grant request amounts, and Senior Mini-Grant match requirement, workshop attendees discussed cost efficiency and performance indicators as they relate to the evaluation of grant project proposals and monitoring of grant-funded projects.

This report summarizes feedback received to date, outlines potential changes to the evaluation criteria and program requirements in response to feedback received, and provides a brief update on other SANDAG planning efforts related to specialized transportation. The Transportation Committee is asked to discuss potential changes to the evaluation criteria and program requirements.

**Discussion**

***Feedback Received***

Feedback received from the Transportation Committee, the ITOC, and public stakeholders is summarized in Attachment 1. Generally, feedback highlighted the value of service providers of different sizes and maximizing cost efficiency.

***Potential Changes to Program Requirements and Evaluation Criteria***

Prior to each competitive process, released every two years, evaluation criteria and other program requirements are assessed and adjusted based on lessons learned and input from the Board of Directors, Transportation Committee, ITOC, and public stakeholders. In response to the recent feedback received, four questions have been identified for the Transportation Committee's consideration.

### *1. Create Large and Small Categories based upon Amount of Grant Funding Requested?*

To address feedback on competition between large and small agencies for funding, SANDAG could establish large and small categories within the STGP. Two other SANDAG grant programs, the *TransNet* Active Transportation Grant Program (ATGP) and the *TransNet* Environmental Mitigation Program's Land Management Grant Program, separate projects into large and small categories based on the grant request dollar amount. A percentage of available funding is designated towards each category and projects compete against like-sized projects. Evaluators have flexibility to recommend funding awards across categories to ensure all available funding is awarded and to minimize partial funding awards.

While establishing large and small categories within the STGP call for projects may "level the playing field" between large and small agencies, it may unintentionally conflict with an underlying objective of the grant program to maximize the number of riders served and the number of trips provided. An analysis of grant-funded projects from previous cycles shows that agencies requesting greater grant amounts operate transportation programs that serve more people and provide more trips at a lower cost. Establishing large and small categories and separate pools of funding for each will limit the number of large projects that receive funding and in turn, reduce the STGP's overall reach and efficiency. For this reason, it is recommended to maintain the current structure of the STGP whereby all projects, regardless of size, compete against each other for the same pool of funding.

### *2. Constrain Eligible Matching Funds?*

Currently, Senior Mini-Grant funds are an eligible match source for Section 5310 projects and Section 5310 funds are an eligible match source for Senior Mini-Grant funds. In previous cycles, many projects have been successful in receiving grant awards through both funding sources, making the project whole. In an effort to promote longer-term operational sustainability, SANDAG could prohibit this matching of funds. This change would require applicants to secure other funds for match. However, the change could result in a reduction of service. Applicants that rely on both grant funding sources to make their project whole may not be able to secure enough match funds to support current service levels and would need to reduce service to afford to sustain their transportation programs. To avoid service reductions, applicants could pursue other funding sources to use as match. Guidance from the Transportation Committee is sought on this potential change.

### *3. Add Criteria on Project Readiness?*

To address feedback on project readiness, SANDAG could incorporate a project readiness eligibility criterion and/or evaluation criterion. The intent of the new criterion would be to ensure applicants are prepared to implement proposed projects and have the technical capacity to manage a grant. Start-up costs associated with developing project materials, hiring project staff, and advertising the project can drive up the cost of service provision. An eligibility and/or evaluation criterion on project readiness would either require or encourage applicants to achieve a base level of readiness to be able to provide service immediately following a grant award and in a cost-efficient manner.

Initially, when the STGP began distributing funds in 2006, the grants provided start-up or seed monies to several new transportation projects. Projects that benefited from these early start-up grants are now part of the robust social services transportation network that exists in the region today. As the STGP continues to mature, much of the grant funding goes towards sustaining existing transportation services. Prioritizing readiness through an eligibility and/or evaluation criterion may limit innovation and the development of new services in areas identified as transportation gaps. In lieu of or in combination with a project readiness criterion, SANDAG could set aside funding to support planning projects or pilot services that expand the current network and test innovative service provision. Alternatively, the grant program would not pay for the costs to start up the proposed service, but would start funding once the program began in earnest. For reference, the *TransNet* ATGP and SGIP include project readiness criteria for capital grants, but not for planning/non-capital grants. Guidance from the Transportation Committee is also being sought on these options.

#### 4. *Incorporate Cost Control Measures?*

To address feedback on cost efficiency, the Transportation Committee is also asked to consider the incorporation of cost control measures both in the evaluation criteria and oversight of grant-funded operating projects. Currently, cost efficiency is measured using a cost per trip metric. A quantitative criterion evaluates cost per trip using a matrix that assumes applicants achieve greater efficiencies over time, as measured by number of years the applicant has been providing transportation services. This criterion could be updated to include a scale of cost per trip ranges as percent reductions of the average regional cost of a paratransit trip provided by Metropolitan Transit System and North County Transit District. A project would be awarded more points for a proposed cost per trip that represents a greater reduction from the regional average cost per paratransit trip. This change would provide a direct relationship for specialized transportation trips within the transportation industry and encourage applicants to propose projects that exhibit greater cost efficiencies.

Cost per trip is also evaluated through a qualitative criterion, which seeks to evaluate the reasonableness of the proposed cost per trip given the parameters or context of the proposed service. Justification for a proposed cost per trip may include service area (urban or rural setting); average miles per trip (higher mileage increases cost per trip); trip grouping (which reduces the cost per trip); or reference to comparable services among other factors. Evaluators have discretion to award points based on applicants' justification. This evaluation criterion could be adjusted to provide evaluators with clearer direction on how to allocate points based on factors affecting cost per trip.

Finally, SANDAG could also establish cost control measures within the oversight and management of grant-funded projects. Like all SANDAG grant programs, STGP funds are distributed to grantees through reimbursement of actual, eligible expenses. SANDAG could continue to distribute STGP funds in this manner, but establish a reimbursement cap using the cost per trip rate identified in the project scope of work. Grantees would receive grant funds equal to the reimbursable expenses or the number of one-way passenger trips provided in a reporting period multiplied by the project's approved cost per trip rate, whichever is less.

### ***Related Planning Efforts***

SANDAG currently has three planning efforts underway addressing specialized transportation in the region that are helping to inform this call for projects to some degree. These planning efforts, which include the Coordinated Public Transit – Human Services Transportation Plan (Coordinated Plan), the Flexible Transportation Services for Seniors planning study, and the Specialized Transportation Strategic Plan, as described in Attachment 2, focus on assessing specialized transportation demand and strategies for meeting the needs of seniors and individuals with disabilities. These planning efforts are anticipated to conclude in fall 2018, and therefore, will inform future funding cycles.

### **Next Steps**

Over the next few months, work will continue with stakeholders to review and refine the draft STGP evaluation criteria. Proposed revisions will be brought to the Transportation Committee and the ITOC this summer in anticipation of the Board of Director’s approval of the Cycle 10 call for projects.

CHARLES “MUGGS” STOLL

Director of Land Use and Transportation Planning

- Attachments:
1. Summary of Feedback Received
  2. Summary of Current Specialized Transportation Planning Efforts

Key Staff Contact: Audrey Porcella, (619) 699-1961, [audrey.porcella@sandag.org](mailto:audrey.porcella@sandag.org)



### ***Summary of Feedback Received***

To date, feedback on the Specialized Transportation Grant Program (STGP) has been received from the Transportation Committee, the Independent Taxpayer Oversight Committee (ITOC), and public stakeholders consisting of current grantees and past grant applicants.

#### *Transportation Committee*

Comments from the Transportation Committee on January 19, 2018, included:

- Seek the greatest benefit from program funds or “biggest bang for the buck” by emphasizing cost efficiency
- Support trips to social, recreational, and civic activities (which are as important as medical trips in contributing to the health and well-being of seniors and individuals with disabilities) by not limiting trips to a particular trip purpose
- Evaluate the impact of reducing the maximum grant request amount per agency.

Since presenting to the Transportation Committee, a review of the results from the previous funding cycle (Cycle 9) was conducted to determine the impact that lowering the \$500,000 funding cap per agency would have on the funding recommendations. Two scenarios were analyzed: reducing the cap to \$400,000 and \$300,000 per agency. In both cases, there was no change in the mix of large and small grantees that would receive grant funds.

#### *ITOC*

Comments from ITOC on February 14, 2018, included:

- Emphasize cost efficiency and maximize geographic coverage of specialized transportation services
- Evaluate projects based on a comparison of the amount of dollars requested to the service area covered
- Incorporate the concept of project readiness and milestone achievement into the objectives of the grant program
- Consider raising or eliminating the maximum grant request per agency to allow program funds to be awarded to one or two providers that, given greater economies of scale, have the capacity to serve more people or a larger service area at a lower cost
- Evaluate the effectiveness of the grant program and consider alternatives such as issuing a request for proposals for one provider to expend the entire sum of funds, or subsidizing on-demand services, like Uber and Lyft, to provide transportation to seniors
- Support non-profits and local agencies, which have a unique bond with the community and clients they serve
- Determine whether SANDAG has a role in assisting service providers in seeking outside funding to ensure the stability and sustainability of their transportation programs

## *Public Stakeholders*

Feedback from workshop attendees on February 28, 2018, consisting of current grantees, past applicants, and Vice Chair Bill Sandke, included:

- Refine the draft goal and objectives to capture the variety of specialized transportation services and encourage operational sustainability and continuous improvement in service provision
- Maintain current minimum and maximum grant request amounts
- Consider adjusting the match requirement for the Senior Mini-Grant program to be a sliding scale in which applicants that request more grant funds are required to provide matching funds at a higher percentage of the total project cost
- Support both small and large agencies given varying areas of specialty both in terms of type of service provided and specific clients served
- Evaluate the degree to which the STGP should support services that go beyond basic transportation, such as door-through-door services
- Consider alternative metrics to measuring cost efficiency and measuring the overall performance of grant projects such as cost per mile, level of service provided, fulfillment of ride requests, client feedback, and health outcomes among other metrics
- Explore opportunities for coordination such as a coordinated dispatch software and insurance coverage
- Consider incorporating interviews as a part of the project evaluation process
- Develop a regional brand identity for specialized transportation services funded through SANDAG

### ***Summary of Current Specialized Transportation Planning Efforts***

#### *Coordinated Public Transit – Human Services Transportation Plan (Coordinated Plan)*

The Coordinated Plan is a federally mandated planning document that SANDAG updates every two years. The Coordinated Plan assesses available transportation services, including services funded through the Specialized Transportation Grant Program; assesses transportation needs of seniors, individuals with disabilities, and persons with limited means; addresses gaps between current service and needs; and identifies funding priorities for service implementation. Staff has been conducting focus groups to seek input on the update. It is anticipated that this effort will conclude in summer 2018. This effort could help inform where the largest gaps in services exist and how SANDAG may want to focus limited grant funds.

#### *Flexible Transportation Services for Seniors*

SANDAG was awarded a Caltrans Transportation Planning grant to study how technology can enhance specialized transportation service provision and provide on-demand transportation for seniors. The study is looking at how other regions have tapped into on-demand transportation services such as Uber, Lyft, taxis, and other third-party transportation providers to supplement paratransit service or provide first-mile and last-mile connections to fixed-route. This study could help inform how such services could be considered in SANDAG grant programs. Work is expected to conclude in summer 2018.

#### *Specialized Transportation Strategic Plan*

Identified as a near term action in San Diego Forward: The Regional Plan, this effort intends to forecast demand for specialized transportation services out to 2050 and develop a comprehensive set of strategies for the region to meet this demand. The strategies will consider coordination with federal, state, and local plans and policies; public-private partnerships; phasing; funding sources; and opportunities for pilot projects. Similar to the other planning efforts, this work will help inform SANDAG's role in the future, both in terms of the grant programs and other transportation planning, including the development of San Diego Forward: The 2019-2050 Regional Plan. Work is expected to conclude in fall 2018.