PACTS TRANSIT COMMITTEE WORKSHOP AGENDA
July 9, 2020
9:30 – 11:00 a.m.
Zoom webinar: https://us02web.zoom.us/j/81759105065

As of March 31st, 2020 PACTS and GPCOG are holding all committee meetings via Zoom conferencing technology. We remain committed to full public access and participation in our meetings through remote access during the COVID-19 crisis. Remote meetings will be held in accordance with the requirements of LD 2167, Public Law Chapter 618.

1. Welcome

2. Open Public Comment
Residents are welcome to provide up to three minutes of public comment on any issue, including items on the agenda.

3. Acceptance of May 26, 2020 Transit Committee Workshop Minutes (Attachment A)

Staff Report
The May 26, 2020 Transit Committee Workshop minutes were included for the Committee’s information with the June 11, 2020 Transit Committee meeting packet and are included again here for the Committee’s acceptance.

4. Presentation on the Medium and Long-Term Impacts of COVID-19 – 40 minutes

Staff Report
Funds were allocated in the first phase of CARES Act funding for post-pandemic transit planning for the PACTS region. The Committee will receive a preliminary presentation from consultant AECOM and GPCOG staff on work to date. Conclusions will be shared
within the next couple of weeks. This work will inform the approach to allocating the region’s remaining CARES funds.

**Proposed action: For information only.**

**5. Overview of Funding Opportunity: Inclusive Transportation Planning Mobility On Demand Grant Program** (Attachments B and C) - 10 minutes

GPCOG is working on an application for the Inclusive Transportation Planning Mobility on Demand grant program. National competitive funding will support three projects at $300,000 over 18 months. This is the new round of the Transit Planning 4 All funding that GPCOG has received twice and for which we were encouraged to apply by the funder, Community Transportation Association of America.

Projects will identify, develop, and implement Mobility on Demand solutions that respond to local transportation barriers and issues and test a standard way of sharing trip data to support coordination and mobility on demand. The first half of the project uses human-centered design for planning, while the second half would focus on implementation.

This funding could provide additional capacity for implementing the “Make Transit Easy” components of Transit Tomorrow. A one-page summary of the opportunity is included as Attachment B, and the full request for proposals is included as Attachment C.

**Proposed action: Discuss and provide guidance on the project application for this region.**

**6. Discussion of Framework for Transit Agency CARES Act Phase II Requests** – 40 minutes

**Staff Report**

The Coronavirus Aid, Recovery, and Economic Security (CARES) Act made $53M available to the PACTS region for public transportation. The initial phase of CARES funding apportioned approximately $14M to address the immediate needs of transit agencies for February 1 to June 30, 2020. Phase II is focused on addressing the longer-
term effects of the COVID-19 pandemic on transit agencies and improving the resiliency and efficiency of the regional public transportation network.

Staff and the PACTS Transit Committee developed a framework for programming these funds that includes a 3.5-year planning horizon and the allocation of funds in six-month increments to account for changing circumstances. The primary focus for the remaining funds is on preserving the region’s existing transit service. Other priorities include pandemic recovery and resiliency, transit system innovation, and direct municipal budget assistance.

Transit agencies' submissions of baseline revenues, estimated lost revenues, and estimated operated expenses totaled approximately $32M for Priority One through the end of 2023. The Transit Committee agreed at its June 30 meeting that further refinement of the template and further exploration of each agency’s unique circumstances were necessary to determine an appropriate estimate of the region’s Priority One needs. This would determine the amount of funding available for other priorities, including a potential allocation to Concord Coach Lines, or possibly inform a revised approach to the allocation of the remaining funds. The results of this work will be shared at the workshop.

*Proposed action: Review and discuss the results of the discussions with transit agencies and refine the draft framework(s).*

7. Other Business

8. Adjourn

Upcoming Meetings
- July 21, 9:30 a.m. – PACTS TIP Committee
- July 28, 1:00 p.m. – PACTS Transit Committee Meeting
- August 4, 8:30 a.m. – PACTS Executive Committee
- August 13, 9:30 a.m. – PACTS Transit Committee
- August 25, 1:00 p.m. – PACTS Transit Committee Workshop
# PACTS TRANSIT COMMITTEE WORKSHOP MINUTES
May 26, 2020

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<tr>
<th>Name</th>
<th>Affiliation</th>
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<tr>
<td>Hank Berg, Vice Chair</td>
<td>Casco Bay Island Transit District</td>
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<tr>
<td>Lori Brann</td>
<td>MaineDOT</td>
<td>Y</td>
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<tr>
<td>Chris Chop</td>
<td>Maine Medical Center</td>
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<td>Robert Currie</td>
<td>YCCAC</td>
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<tr>
<td>Jack De Beradinis</td>
<td>RTP</td>
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<tr>
<td>John Duncan</td>
<td>City of South Portland</td>
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<tr>
<td>Casey Gilbert</td>
<td>Portland Downtown</td>
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<tr>
<td>Rebecca Grover</td>
<td>Maine Turnpike Authority</td>
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<tr>
<td>Bruce Hyman</td>
<td>Planning Committee Appointee</td>
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<td>Gregg Isherwood</td>
<td>Custom Coach &amp; Limousine</td>
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<td>Greg Jordan, Chair</td>
<td>METRO</td>
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<tr>
<td>Patricia Quinn</td>
<td>NNEPRA</td>
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<td>Tony Scavuzzo</td>
<td>BSOOB Transit</td>
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<td><strong>Guests</strong></td>
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<td>William Gayle</td>
<td>NNEPRA</td>
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<td>Donna Larson</td>
<td>Sebago Technics</td>
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<td>Greg L’Heureux</td>
<td>City of South Portland</td>
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<td>Nate Moulton</td>
<td>MaineDOT</td>
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<td>Steve Sawyer</td>
<td>Sebago Technics</td>
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<td><strong>For GPCOG</strong></td>
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<td>Kristina Egan, Carole Martin, Ryan Neale</td>
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1. Welcome
Greg opened the meeting.
2. Open Public Comment
Steve Sawyer of Sebago Technics spoke about Sebago’s work on signal prioritization and reduction of delays for buses in South Portland. He suggested that some CARES Act funds be utilized for traffic signal priority to improve the appeal and performance of bus service by shortening route time, improving on-time performance, and reducing delays. He noted that the costs of a region-wide effort would vary but could be in the area of $20K per intersection and $7,500 per bus; it could be less than $1.5M for 50 intersections. He encouraged the Committee to consider this suggestion and noted that such capital expenses are eligible for CARES funds. Setting up traffic signal prioritization infrastructure is a step toward integrating emergency vehicle preemption. He invited the Committee and members to reach out for more information. Donna Larson of Sebago Technics also joined the meeting.

3. Approval of CARES Act Assumptions and Priorities
Attachment A of the meeting packet is a redline version of the revisions to the assumptions and priorities based on the input received at the 5/14/20 Transit Committee meeting.

Greg said Attachment A is a general set of priorities and Attachment B is the operationalization of the priorities and the two do not need to line up. Bruce noted that recovering ridership may not be consistent with recovering revenue as listed in Attachment B. Bruce noted that regaining revenue may be at odds with regaining ridership. Eliminating fares for a longer period would help with ridership recovery but would not address revenue recovery. Kristina said the priorities are directed toward rebuilding ridership and Attachment B speaks to using CARES funds to backfill revenues. Greg said ridership can be recovered through improvements, expanded safety, and marketing, but we should reinstitute fares as quickly as possible to improve agency sustainability going forward. We do not want to have zero or reduced fares for longer than necessary. Kristina suggested that a reporting function be included in Attachment B, 1D, on when agencies will ramp fares back up to normal. Tony said that BSOOB Transit, METRO, and SPBS are planning to move forward together on fare resumption as soon as possible. Reinstating fare revenue will ease the burden on CARES funds and allow those funds to be used for other purposes.

Jack asked if the group’s consensus is to resume fare collection in a few months, noting that RTP would want to be consistent with other agencies. Greg said the coordination
of fare policy has been done between agencies and not at the Transit Committee. Hank said CBL’s normal summer fare has not been introduced and will not be until CBL resumes normal service. Bob said YCCAC suspended fare collection at the end of March and is not planning to resume fare collection in the near future. Greg noted that fare collection was stopped as a public health measure, not for economic reasons. Hank said CBL did not have the same public health issues because the vessel is larger. NNEPRA’s service is currently suspended; the intent is to keep the existing fare structure in place when service resumes.

The group was supportive of including a requirement for agencies to report on fare status as part of the regular check-ins. This will be included as part of Attachment B.

4. Discussion and Approval of Model for Transit Agency CARES Act Phase II Requests
Attachment B includes several revisions that reflect the Committee’s discussions. Priority 1 was revised to operating revenue in general rather than passenger revenue. Priority 1e now includes the identified disaggregated sources of revenue. Transit agencies should let staff know if there are other sources that should be listed. Priority 1d establishes monthly check-ins and notes a 3.5-year timeframe for initial modeling. The timeframe will not exceed 3.5 years and may be shortened as appropriate.

Bob noted that the model does not list operating expenses and is focused on revenue. Greg said drawdowns of CARES funds will be based on actual expenses. The intent is to use CARES funds to offset revenue losses; the CARES funds offset the revenue that would have been used to cover expenses had it not been lost. Bob said he wanted to be sure that CARES funds will offset operating expenses. Kristina noted that Phase 1 totaled $14M for reimbursement of all operating expenses and did not include the 5307 and 5337 allocations. Shifting to estimated revenue losses will enable the CARES funds to be used for more things and for a longer period because “normal” allocations will cover “normal” operating expenses.

Bob noted that all agencies have different cost structures and revenue streams and described YCCAC’s model which includes a variety of local sources. Somewhere around 3 – 5% of YCCAC’s revenues come from fares. YCCAC receives job access reverse commute funds through the state. Lori said that Attachment B indicates that CARES Act funds can be used to cover revenues, which are the source of local match, and might imply that CARES funds can be used to match formula grants, which is not
the case. Greg said that accounting measures may be different for each agency. The goal is to cover passenger-based revenue that will be lost. Lori noted that YCCAC has fewer funding streams than other agencies. Bob said that the funding sources which he uses to match federal funds are not in jeopardy currently and he can use volunteer hours in some cases. He added that while fare revenue is not being received, it is a small portion of YCCAC’s budget.

Hank said CBL is affected by the CARES Act not funding lost revenue. He sees this section as covering the difference between revenue and expenses. This relates to CARES Act restrictions rather than PACTS.

Ryan said his understanding of FTA’s response on the eligibility of revenue from freight carriers for CARES funds is that freight is treated the same as other revenue sources.

Carole asked for the group’s input on the other listed priorities. In response to a question from John, Greg said we will not know how much funding will go to Priority One until we have estimates from the agencies. Agencies will have to make assumptions about ridership recovery in their estimates. METRO is assuming boardings will be 50–60% of normal initially and will increase over time; therefore, the need for CARES funds for Priority One should decline over time.

Jack said he expects demand for RTP’s service to increase fairly quickly, but he is concerned that capacity will be limited for health and safety reasons. Tony shared Jack’s concerns about the impact of social distancing on ridership and fare recovery. Tony added that the direct municipal budget assistance is vital to BSOOB Transit, although it is not a piece for some agencies.

Hank said that while ridership projections are unique for each agency, it may be helpful to have a shared understanding of when social distancing restrictions might be lifted. The group discussed their order of priorities after Priority One is addressed. Hank listed them as pandemic recovery and resiliency, state of good repair, direct municipal assistance, and innovation. Patricia agreed that pandemic recovery should be first. She said that agencies should be planning for state of good repair and may have other funds for this, and put state of good repair as a last priority. Innovation is her second priority. The pandemic will change how agencies do business and interact with customers; innovation is important to enable agencies to serve the public going forward. The CARES funds should sustain agencies and help them prepare for the future. Jack listed
the order of priorities as pandemic recovery and resiliency, state of good repair, and innovation, and said he does not have a good understanding of the need for municipal assistance. Greg L’Heureux said that pandemic recovery and resiliency are essentially part of Priority One and should be a top priority. He said that the City of South Portland is facing significant budget constraints and revenue losses and assistance to municipalities and property owners should be a necessity. State of good repair would be third, and transit innovation would be the last priority.

Carole and Greg summarized that pandemic recovery and resiliency is a clear priority for the group. Greg said his opinion is that municipal assistance should be a second area of focus, depending on what happens with federal assistance to municipalities. Transit innovation would be third, and state of good repair fourth, as there are other sources of federal funds for vehicle replacement and asset maintenance. Tony said that BSOOB Transit’s intent to keep flat funding for municipalities is contingent upon federal municipal assistance. The ask for municipal contributions would increase if municipalities receive assistance. In response to a question from Patricia about the municipal assistance bucket, Greg said METRO is looking at using CARES funds that would come to METRO to offset what municipal contributions would have been. Patricia said her understanding is that the funds would replace municipal contributions as a revenue source. The wording should be clarified to make it clear that we would be supplementing revenue sources that may be in jeopardy.

Hank said that this item appears to be replacing lost revenue and his understanding is that this is not eligible for CARES funds. He said he is struggling with the idea of replacing lost municipal revenue as opposed to replacing lost revenue from other sources. Greg said that FTA’s guidance is that funds can be used to assist local and state governments given the budget pressure they are under. He noted that Priority One should account for other sources of revenue. Kristina said she views assistance to municipalities as a credit rather than replacement of a revenue source. Hank noted that this does not apply to all agencies. Kristina said our allocations of CARES acts should benefit the region’s transit network, and municipalities are part of this transit network. Hank said municipalities are not an integral part for all agencies in terms of funding.

Greg L’Heureux said the City of South Portland will face a significant drop in property valuation and will not have the tax base to support the transit system as in the past. Hank said he rated municipal assistance low because it does not apply to all transit agencies. Greg Jordan said that passenger-based revenues are 15 – 25% of the
operating revenues for fixed route bus agencies. CBL and NNEPRA may be more able to pull revenue from Priority One and the municipal assistance may be another stream for fixed route bus agencies. Hank said Casco Bay Lines is able to cover operating expenses for cruises and tours with CARES funds, but not the revenue, which is used for local match. CBL’s revenue over the summer months covers deficits for the rest of the year and local share for capital projects. Tony noted that BSOOB Transit may not have any trolley revenue this summer and is also looking at flat municipal funding. The summer trolley revenue helps to balance out the rest of the year. We should be careful to respect all revenue streams and make sure that everyone is whole. Hank said he is concerned about the loss of local match for CBL’s large upcoming capital projects.

Carole summarized that there is general agreement on pandemic recovery and resiliency as the first priority after Priority One is addressed. There is no agreement yet on the other three areas. Kristina noted that the community input effort will inform further discussions on the other three areas. There is general agreement that all of the priorities are important areas to consider.

5. Discussion of Outstanding Questions Related to CARES Act Funding
Information provided by NNEPRA on Federal Railroad Administration funds is included in the packet. Patricia said the funds came to Amtrak to help fill a gap. A cap was established on how much states can be billed by Amtrak. The amount that NNEPRA pays to Amtrak is capped at $695K per month. NNEPRA has to pay this in addition to other expenses. Amtrak considers the state payment to be the difference between what NNEPRA is charged for operating costs and revenues. Each state’s payment is capped at 80% of what it was in FY2019. Payments through February were subtracted from the amount for the remaining seven months of the federal fiscal year. The process is complicated but is set. This helps NNEPRA offset some of the lost fares revenue but only goes through the end of September currently. It is not clear what will happen in October and beyond. Amtrak has submitted a request to Congress outlining issues with the current methodology for distributing funds and requesting additional funds for the following year. In response to a question from Greg on the resumption of service, Will said NNEPRA will follow guidance from Governor Mills. The expectation is that service will return soon after it is allowed and will be phased in. Patricia said the resumption of service will not change NNEPRA’s finances between now and September. Whatever is made in revenue is used to decrease the amount of money that Amtrak draws down from the CARES Act set aside for state supported services.
FTA has indicated that the handling of CARES funds relative to the “normal” 5307 and 5337 allocations is a local or regional decision. Ryan said his understanding is that if the region so desired it could establish guidelines for this, or this could be left to individual transit agencies. John said his understanding is that individual agencies can determine their own use of normal allocations and CARES funds. Hank said he had seen that existing regular 5307 funds can now be drawn at 100% with no requirement for state or local match. Lori said this may only be for COVID related expenses and later shared the information she had on this issue. FTA has provided guidance that only those expenses directly related to responding to COVID-19 are considered emergency relief and eligible for Section 5307 or Section 5311 funds under the FTA’s Emergency Relief Program. Examples of such expenses include:

- Removal of health and safety hazards, such as cleaning of vehicles and facilities
- Costs associated with shutting down or restarting service
- Materials such as hand sanitizer, gloves, soap, and cleaners
- Emergency protective gear relevant to the emergency
- Temporary service, that is not part of regular service, provided in response to the emergency

According to FTA, 5307 and 5311 funds may be used to reimburse operating expenses not directly related to responding to COVID-19, including maintaining regular or reduced service, at the standard federal share for those recipients that are normally eligible for operating assistance.

FTA indicates that Concord Coach Lines is potentially eligible for funds in the states in which they operate (Maine, New Hampshire, and Massachusetts). Staff will seek additional information from Concord Coach. Bruce asked which funds would be included. Ryan said his understanding is that the process for Maine would apply to any states in which Concord operates. Concord’s request would be for CARES funds only. MaineDOT is planning to provide funds for Concord through the 5311 program. In response to a question from Will, Kristina said that the discussion so far has not involved Concord looking at anything other than the Priority One focus on lost revenue.

Nate Moulton said that MaineDOT is working with Concord under the 5311 inter-city program. A 5307 allocation could come to MaineDOT which would certify Concord as an essential service. MaineDOT would then execute another 5307 contract with Concord in addition to the 5311 contract. Will asked how we would handle a request
from another inter-city operator such as Greyhound. Kristina responded that this request would be considered like that for Concord Coach. She said that Concord’s request is important because of the economic connections between Portland and Boston and that PACTS’ discussions with Concord have been limited to the Portland – Boston corridor. Nate said MaineDOT is using 5311 CARES funds to provide funding to Greyhound, Biddeford-Saco, West Transportation, and Cyr Bus. Concord is different in that they have not previously sought subsidies while the others have received inter-city funds for their routes. Kristina noted that private bus carriers are advocating for federal relief. Concord has indicated that their request will be adjusted based on any federal funds that are made available to private carriers. We will want to recalibrate with our six-month check-ins based on any federal funds that are available.

6. Discussion and Agreement on Community Outreach Process
PACTS is preparing a single survey to cover two areas in which we need to gather public input: the allocation of CARES funds and to inform our post-pandemic transit planning. Staff invited Committee members to share any comments on the process or the draft questions.

Will said that the current question 6 addresses the priorities that have been discussed. Understanding what the public is looking for in returning to transit will give us a sense of how to best use CARES funds to address the public’s concerns. Carole said the Transit Tomorrow survey process is consistent with the CARES funds timeline and that staff would seek to work with the Portland Regional Chamber of Commerce in distributing the survey.

7. Other Business
Greg noted that the Transit Committee will next meet on June 11. There was no other business.

8. Adjourn
Inclusive Transportation Planning
Mobility on Demand Grant Opportunity

About the Funding Opportunity

The Community Transportation Association of America, with funding from the US Administration for Community Living and in collaboration with the Federal Transit Administration, has announced a grant opportunity for three projects lasting up to 18 months that identify, develop, and implement Mobility on Demand solutions, funded up to $300,000 each.

This grant opportunity puts primary emphasis on strong partnerships anchored in the inclusion of older adults, people with disabilities, and caregivers in the project development process. This proposal will build on the extensive efforts of Greater Portland Council of Governments (GPCOG) to create a diverse coalition focused on improving access and equity in the region’s transportation system.

What is Mobility on Demand?

Mobility on Demand (MOD) is an approach to leveraging emerging mobility services defined by the following attributes:

- Multimodal
- Integrated
- Automated
- Accessible
- Connected
- Innovative
- User-focused

Some MOD projects have included real-time “Where’s My Ride” tracking for smart phones; community-based mobile apps that connect volunteer drivers with neighbors in need; and trip planning platforms that assist in navigating transit systems with multiple providers.

The Human-Centered Design Approach

The transportation barriers facing the greater Portland region demand solutions that address the real problems faced by our residents as they travel to work, school, medical appointments, social visits, and other essential trips. These needs have only intensified in the face of service disruptions and social distancing measures due to COVID-19.

The planning phase of this project will use the Human-Centered Design approach to identify barriers and generate potential solutions. Human-Centered Design is a process that:

- Builds deep empathy
- Generates “tons of ideas”
- Develops multiple prototypes
- Tests potential solutions with the target group
- Creates a path for implementation

This proposal is driven by the needs of older adults, people with disabilities, and caregivers. GPCOG envisions an inclusive process that solves known transportation barriers.

Implementation

The second phase of this project is implementing the solution developed during the planning phase. The implementation phase will be driven not only by the input of the community participants and organizational partners, but also through close collaboration with a to-be-determined technology vendor. This phase will include a pilot demonstration of the proposed solution.
Developing Mobility on Demand Solutions for People with Disabilities and Older Adults Using Inclusive Planning & Human-Centered Design

Funded by the U.S. Administration for Community Living and Managed in Partnership with the U.S. Federal Transit Administration

Administered by the Community Transportation Association of America in Partnership with the National Association of Area Agencies on Aging, the Institute for Community Inclusion of the University of Massachusetts-Boston and DJB Evaluation Consulting

Inclusive Mobility on Demand Grants Request for Proposals

Purpose

The purpose of this funding opportunity is to weave together inclusive transportation planning, development, and implementation with grassroots-driven mobility on demand (MOD) solutions. Selected grantees will work to fully engage people with disabilities, older adults, and caregivers in partnership with transportation, planning, and human services organizations to identify, develop, and implement mobility on demand solutions that respond to local transportation barriers and issues and test a standard way of sharing trip data to support coordination and mobility on demand.

Funding and Scope of Work

The Community Transportation Association of America (CTAA), with financial support from the U.S. Administration for Community Living (ACL) and in collaboration with the Federal Transit Administration (FTA) and national partners, is planning to fund three grants with a federal funding level of up to $300,000 per award for an 18-month period, with two 9-month budget periods.

While total funding for each award on this project is expected to be $300,000, at this time, CTAA can only award $150,000 per project. The remaining $150,000 is dependent on future funding from the U.S. Administration for Community Living. Although this funding is expected, it cannot be guaranteed. Funds will be awarded in
two segments of up to $150,000 each, based on the availability of funding. However, applicants must submit a budget of up to $300,000 to cover the costs of the entire project, which includes planning and implementation.

The first funding segment of up to $150,000 will be awarded upon selection and will cover the first 9 months: September 2020 – May 2021. Should additional funding not be available, CTAA and its partners will work with the selected applicants to modify their project work plan and budget to conform to available funding. If funding becomes available for the second segment of up to $150,000 per awarded grantee, the budget period will cover the second 9-month period: June 2021 – February 2022.

The work to be undertaken by grantees will be carried out in two phases: a Planning Phase and an Implementation Phase. The Planning Phase will entail:

- Ensuring that the project team is fully inclusive (at least half of its members must be older adults and people with disabilities) and includes representation from transportation, aging and disability organizations, and other critical stakeholders;
- Developing a plan for implementation;
- Prototyping potential mobility on demand solutions;
- Selecting the approach and MOD solution(s) that will be implemented during the Implementation Phase; and
- Developing an evaluation plan.

The Implementation Phase will begin when the project team is ready and will include evaluation of the specific MOD solutions selected by the grantee community.

Grantees will work at their own pace responding to the unique circumstances of each grant community. For example, a selected grantee may have engaged extensively in inclusive planning prior to the start of the grant and would likely need to spend less time on the Planning Phase and be able to move more quickly to the Implementation Phase. It is intended that grant activities will flow smoothly through both phases. However, planning activities (as outlined above) must be fully executed before implementation activities can begin.

Note: Applicants will be asked to submit a budget by phases; that is, applicants will be asked to develop a budget for the Planning Phase and a separate budget for the Implementation Phase. Planning will begin on, or about, September 1, 2020, and must be completed no later than April 30, 2021. However, as noted above, the Planning Phase may be completed prior to April 30, 2021, if the applicant has completed all of the required planning activities and is able to demonstrate readiness to move to implementation.

What Is Different about This Project?
This project is grounded in the belief that the full engagement of older adults and people with disabilities in transportation planning, development, and oversight will lead to better and more user-responsive community transportation. The new funding opportunity will
take what has been learned from our past inclusive planning work in a specific direction. Mobility on demand (MOD) is intended to offer more personal choice through the development of flexible mobility options that serve all travelers (for this project, the focus is especially on older adults and people with disabilities). Importantly, MOD is a systems approach that aims to connect people to all available modes of travel in a seamless whole by utilizing technology and embracing a demand-responsive culture. In demand-responsive transportation (DRT), riders request a trip to a certain destination at a particular time; however, there is no one approach to offering DRT. Rather, DRT may be provided as a publicly funded dial-a-ride service, through a volunteer transportation program, by taxis, via ride hailing services such as Lyft and Uber, and as a microtransit option.

Current developments in the transportation field serve as a catalyst to the particular focus of this project. There is also growing interest in FlexDanmark (https://www.aarpinternational.org/the-journal/current-edition/flexdanmark), which developed as a response to unmet transportation needs and consumer demand in Denmark, and offers demand-responsive transportation in this predominantly rural country. New technologies and changing consumer and community expectations for personal mobility spurred development of the Federal Transit Administration’s Mobility on Demand Sandbox Program (https://www.transit.dot.gov/research-innovation/mobility-demand-mod-sandbox-program), which supports transportation system innovations that are “multimodal, integrated, automated, accessible and connected.” Finally, in November 2019, the Transit Cooperative Research Program (TCRP) released Research Report 210, “Development of Transactional Data Specification for Demand-Responsive Transportation” (http://www.trb.org/Main/Blurbs/179848.aspx), offering a vision of an interconnected community transportation system enabled through adoption of a common data language.

Expectations and Evaluation

Funders are particularly interested in proposals that use a standardized way to share trip data among providers and thus support coordination. Funders are also interested in mobility on demand technology solutions that are transferrable and scalable to other communities across the United States. Applicants that are developing and/or implementing open source technology solutions will score more favorably compared to those that are developing/implementing technology solutions that would result in one-off projects.

The expectations for these grant projects are that: (1) the work to be undertaken by grantees will be sustainable, building on the current transportation system and putting in place new operating policies and procedures to support inclusion and mobility on demand in the community; and (2) the projects will be replicable in other communities across the country. The grants will serve as a learning laboratory and their work will inform the development of a toolkit to help guide other communities that undertake development of inclusive mobility on demand initiatives. Learning from the grants will be documented throughout the project and shared with appropriate federal, state, and local
agencies, policymakers, private foundations, and other stakeholders. We anticipate that learning from these grants will add to the knowledge garnered from previous projects and help to build recognition and support for inclusive planning and mobility on demand across the United States.

Successful applicants will be asked to participate in an evaluation and provide before and after data on elements such as ridership, unmet trip requests, and wait times. Performance measures and targets will be developed with grantee input to evaluate the impact on the quality of life of older adults and people with disabilities and improvement in the level of inclusion. Measures will also demonstrate the degree to which the mobility on demand initiative addresses identified barriers and the recommendations of participants for improving transportation services. Evaluation activities, including overall design; specification of data sources; and data collection from participants, partners, and other stakeholders, will be undertaken as a partnership among successful grantees, Project Liaisons and the Evaluator.

**Key Dates**

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<tr>
<td>06/01/2020</td>
<td>RFP issued. All applications must be submitted online at <a href="https://tp4all.smapply.io/">https://tp4all.smapply.io/</a></td>
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<td>06/29/2020</td>
<td>Teleconference for Interested Applicants: 2:00 PM Eastern time, 1:00 PM Central, 12 Noon Mountain, 11:00 AM Pacific, 10:00 AM Alaska, 9:00 AM Hawaii Call: (800) 949-2175 Passcode: 8477038</td>
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<td>07/31/2020</td>
<td>Proposal Due Date</td>
</tr>
<tr>
<td>09/01/2020</td>
<td>Date of grant award announcement (Approximate); Grantees begin their work</td>
</tr>
<tr>
<td>10/15/2020</td>
<td>Selected grantees participate in an in-person workshop in Washington, DC (projected date) (Workshop may be held virtually)</td>
</tr>
<tr>
<td>05/01/2021</td>
<td>Second segment of funding (based on availability)</td>
</tr>
<tr>
<td>2/28/2022</td>
<td>End date of all grant activity</td>
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**Background**

Since 2013, the U.S. Administration for Community Living (ACL) has supported the Inclusive Coordinated Transportation Partnership Project, through which 33 communities received grant funding to meaningfully engage older adults and people with disabilities in community transportation planning and program development.

ACL’s mission is to maximize health, well-being, and independence for people with disabilities, including people with intellectual and developmental disabilities, people with physical disabilities, and older adults and their families and caregivers, by advancing policies, services, and supports so that people live with dignity, make their own choices, and participate fully in society.

In 2017, ACL funded the Community Transportation Association of America and partners, the National Association of Area Agencies on Aging (n4a), the Institute for
Community Inclusion at the University of Massachusetts Boston, and DJB Evaluation, to build on the work ACL previously funded. This work, the Inclusive Coordinated Transportation Planning Partnership 2013-2017), strengthened coordinated transportation planning and systems for people with disabilities and older adults.

**Definitions**

The definitions of key terms used in this grant solicitation should guide applicants in developing their applications.

**Coordinated Transportation Partners:** These include key organizations; government agencies; providers; and groups involved in funding, designing, developing, managing, providing, and/or overseeing community transportation programs that are committed to inclusive coordinated transportation planning and willing to be actively engaged in the proposed grant.

**Coordinated Transportation System:** A system that brings together a range of transportation modes (e.g., volunteer driver programs, transit), services (e.g., travel training, mobility management) and providers (e.g., public transit, human services transportation providers) for the purpose of improving access to rides for the entire community. A coordinated transportation system is typically a work in progress moving toward a shared, but not yet fully realized, goal. Coordinated transportation systems may exist in local communities, a region of the state, or even statewide. Coordinated transportation systems are likely to vary from place to place in terms of scope, activities, partnering organizations, and level of participant involvement.

**Demand-Responsive Transportation (DRT):** In demand-responsive transportation, riders may request trips from a specific location to another specific location at a certain time. Vehicles do not follow a fixed route or schedule. DRT offers a flexible, rider-responsive service. Examples of DRT include dial-a-ride, ride hailing, taxis, ride sharing, car sharing, bike sharing, and other technology-enabled transportation.

**Human-Centered Design:** As defined by IDEO.org, leaders in the movement, human-centered design is a creative approach to problem solving. The process starts with the people you’re designing for and ends with new solutions that are tailor-made to suit their needs. Human-centered design is all about building a deep empathy with the people you’re designing for; generating tons of ideas; building a variety of prototypes; sharing what you’ve made with the people you’re designing for; and eventually putting your innovative new solution out in the world.

**Inclusive Planning:** A process whereby all stakeholders (especially participants and coordinated transportation partners as defined in this RFP) are actively and meaningfully involved in the plan’s development.

**Mobility on Demand:** As defined by the U.S. Department of Transportation, mobility on demand (MOD) is a multimodal, integrated, automated, accessible, connected, innovative, user-focused approach that leverages emerging mobility services, integrated
transit networks and operations, real-time data, connected travelers, and cooperative intelligent transportation systems to allow for a more traveler-centric, transportation system-of-systems approach. This provides improved mobility options to all travelers and users of the system in an efficient and safe manner.

**Participants:** Older adults, people with disabilities, and their caregivers, including people with intellectual and developmental disabilities, whether they are current riders or non-users of transportation services. Participants must be involved in active, meaningful ways from the beginning (if at all possible, as grant proposals are being developed) and throughout the implementation of the grant. Participants will serve as key advisers and team members, information resources, and decision-makers who are empowered to act independently and exert influence on key decisions, activities, and the outcomes of the proposed grants.

**Note:** The intent is for each grantee to engage a group of participants that is representative of the diverse older adults, people with disabilities, and caregivers who live in the community. For that reason, an older adult, person with a disability, or caregiver who works for, or serves as a representative of, the lead agency or a coordinated transportation partner organization will not be considered a participant.

**Pathway to Inclusion:** A simple, one-page tool designed to guide participants, partners, stakeholders, and communities to determine collaboratively the current level of inclusion in the transportation planning processes at any point in time and to set a goal for the level of inclusion the project hopes to attain. (Available at www.acltoolkit.com.)

**Stakeholders:** Any person or organization with an interest or involvement in inclusive coordinated transportation planning, program development, or oversight. Stakeholders include participants and coordinated transportation partners (as defined), as well as older adults and people with disabilities who may benefit from the work of inclusive coordinated transportation planning, but who are not engaged in the process. They also include those minimally involved, such as attendees at public forums, responders to surveys, or participants in focus group discussions.

**Transportation Funders:** These include, but are not limited to, federal, state, and local government and nonprofit agencies; Centers for Independent Living; Developmental Disability Councils; Veterans Health Administration; Medicaid, Medicare Advantage Plans, and other insurers; school districts; foundations; and other grant funders.

**Qualified Applicants**

**Only nonprofit or governmental agencies,** including county or city government agencies, regional planning organizations, councils of government, and Tribal Nations that are involved in the administration, delivery, or coordination of transportation, aging, and/or disability services may apply. For-profit organizations are not eligible as primary applicants for these grant funds, but applicants may partner with appropriate for-profit transportation, aging, or disability providers.
Applicants must provide evidence of the organization’s eligibility to receive federal funds. To verify eligibility, check the organization’s exclusion status at [https://www.sam.gov](https://www.sam.gov) and include a copy of the relevant page with your application. Please note: If your organization is not listed on this site, you must register your organization on the site before any contract can be completed.

**Required Activities**

Applicants who receive funding under this program are required to undertake these activities:

1. Create a **project team** at the beginning of the project. The project team should consist of participants and coordinated transportation partners and should meet regularly throughout the project. The team will guide the work of the project. **Participants, as defined in this RFP, must constitute at least half of the project team’s membership.**

2. Use a **human-centered design** approach (see definition) to develop a plan for implementing a mobility on demand solution, following these steps in order:
   a. Identify the needs to be addressed through engagement of participants and partners within the community context;
   b. Brainstorm/conceptualize solutions;
   c. Experiment/prototype potential solutions;
   d. Select MOD intervention to be implemented; and
   e. Implement the MOD intervention.

3. Make budget adjustments and any needed work plan changes, based on the availability of the second segment of grant funding in the amount of $150,000, and as needed throughout the project.

4. Develop a **Concept of Operations for the Technology Solution** that documents the key elements required for success, with an eye toward making this process transparent and transferable to other community transportation providers in other communities and states. It will include a description of the resources required to achieve the outcome, problems encountered, and how the problems were addressed.

**Additional Mandatory Requirements**

**Participants**

People with disabilities, older adults, and caregivers, whether current riders or non-users of transportation services, must be involved in active and meaningful ways from the beginning and throughout the grant-funded project. Participants will be engaged in specific tasks, as indicated in the grant application. They will serve as key advisors and informants; information resources; and decision-makers who are empowered to act
independently and exert influence on decisions, activities, and outcomes of the proposed grant. **Letters of commitment are required from three participants, all of whom must be involved in developing the application.**

Involvement of Coordinated Transportation Partners
Agencies/organizations representing aging, disability, and transportation must be involved in the grant. If the local area primary transportation provider is not involved, an explanation is required – see Criterion 2. Coordinated transportation partners will be engaged in specific tasks, as indicated in the grant application. **Letters of commitment from three leading community organizations** (one each from aging, disability, and the primary transportation provider in the community, all of whom must be involved in developing the application) are required.

**Exception 1:** If one of the above mandated organizations is the applicant, a letter from the applicant organization’s CEO is required, and may serve as one of the organizational letters of commitment.

**Exception 2:** If the applicant organization has obtained a commitment from an additional organization (e.g., foundation or other funder) to provide financial support for the proposed project, a letter of commitment from the funder is required.

**Sustainability** is a key requirement of these projects. Grantees must work to ensure that inclusive practices, human-centered design approaches, and mobility on demand move forward beyond the grant period. Efforts to ensure sustainability include:

- Increasing awareness of all constituencies, especially older adults, people with disabilities, and caregivers in the grantee community and beyond about the work being done and the learning gleaned from the project as it goes forward;
- Building and expanding grassroots support for the project among participants, coordinated transportation partners, and the community at large; and
- Identifying supplemental and alternative funding to continue the work begun under this grant.

**Administrative Requirements and Support**
Immediately following the Project Institute (see below), grantees will be required to submit a final detailed work plan and a revised budget. Grantees will also be expected to submit monthly program and financial reports and a final report at the end of the project. The national project partners will provide all forms and guidance on reporting. **A Project Liaison** (from CTAA, n4a, or Institute for Community Inclusion) will be assigned to each grant and will work closely with individual grantees to fully attain all deliverables. The assigned Liaison will:

- Be the first point of contact for each grantee;
- Work with the **Project Evaluator** and the grantee to finalize the project’s evaluation approach; performance measures and targets (including standardized measures of inclusion and a standardized approach to evaluating grant outcomes); data collection plan; and reporting requirements;
• Check in at least monthly with the grantee and ensure that national project partners are informed of grantee progress;
• Assist with reporting;
• Field information questions and technical assistance requests to ensure that the grantee receives the best response and assistance on substantive issues that arise; and
• Make a site visit during the first 9 months of the project.

A Learning Collaborative approach, defined as a participant-centered, team approach for generating and sharing knowledge, solving problems, addressing issues, and providing supports, will be used throughout the project to facilitate information sharing and peer learning. The role of Project Liaisons is foremost to support assigned grantees and assist with finding solutions when challenges and barriers arise. Project Liaisons will be available to provide needed assistance and guidance to their assigned grantees every step of the way. It is recognized that selected grantees will start this work from different places and different levels of experience and knowledge. Grantees may not all progress at an even pace. Therefore, clear expectations for each project will be set individually in consultation with the grantees at the beginning, through identification of specific output and outcome measures.

Grantees will be required to participate in a Project Institute, to be held in Washington, DC soon after the grant is awarded (may be held virtually). CTAA will pay all travel, meal, and lodging expenses for the Institute. These funds do not need to be budgeted as part of the applicant’s budget submission. Grantees will need to bring a team to the Institute that will consist of the project director, participants, and coordinated transportation partners. Once the team has been selected, if grantees wish to invite others to participate in the Institute, they must receive prior approval and grant funds may not be used to support attendance. More details on the Institute will be made available at the time of the grant award. In addition, grantees are expected to:

• Develop, in collaboration with the assigned Project Liaison and the Evaluator, an evaluation plan, including performance measures (outputs, outcomes, targets, and customer satisfaction measures) and action steps that will be tracked throughout the grant period. Performance measures will include a mix of standard, mandated measures across all grants as well as a limited number of grantee-identified measures specific to each grant.
• Develop and submit timely and complete monthly financial and program reports, using the reporting format mandated by the national project.
• Participate in mandatory monthly all grantee conference calls, make bimonthly presentations about your grant and contribute to discussions regarding implementation and topics, such as the meaning of inclusiveness and how to expand inclusive coordinated transportation planning.

Contact Person
For all questions related to this invitation and the application process, please contact:
Virginia Dize at the National Association of Area Agencies on Aging
(vdize@n4a.org; 202-719-8889).
Proposal Format and Submission Guidelines
Proposals submitted after the due date and time or those that do not meet the format requirements will be deemed non-responsive.

A teleconference for interested applicants will be held on June 29, 2020 at 2 PM Eastern time. Call toll-free: (800) 949-2175 Passcode: 8477038

Minimum Requirements
ALL of the requirements listed below must be met in order for an application to be forwarded for complete review by the Review Committee.

1. Application must be received by the deadline.
2. Application must be submitted by on line at tp4all.smapply.io
3. Grant budget must be submitted on Budget Narrative Worksheet and uploaded as part of the online submission.
4. Total grant funds requested cannot exceed $300,000.
5. A qualified organization must submit the application.
6. Six letters of commitment must be included. Three of the letters must come from individual participants (not advocacy organizations) and three letters must be submitted by coordinated transportation partners (one each from agencies/organizations representing aging and/or disability, and the primary transportation provider). Applicants should note the following exceptions:
   Exception 1: If one of the above mandated organizations is the applicant, a letter from the applicant organization’s CEO is required, and may serve as one of the organizational letters of commitment.
   Exception 2: If the applicant organization has obtained a commitment from an additional organization (e.g., foundation or other funder) to provide financial support for the proposed project, a letter of commitment from the funder is required.
7. At least three (but no more than five) letters of support from a combination of any of the following: state agencies, elected officials, community/state leaders, transportation funders. Note: Letters of support should not come from entities that have written letters of commitment.

Screening and Review Process

Screening
All applications received will be screened to determine that the above Minimum Requirements have been met.

Incomplete or non-responsive proposals will not be considered. Only proposals that meet all of the Minimum Requirements specified above will be forwarded to the Review Committee.

Review Process
An independent Review Committee will evaluate the proposals based on the evaluation criteria specified below. It is anticipated that awards will be announced on or about September 1, 2020. Awards will be made through a competitive process to the most qualified applicants.

**Evaluation Criteria**

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<tr>
<th>Criterion</th>
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<td>Criterion 1: Grant Purpose</td>
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<td>Criterion 6: Project Work Plan</td>
<td>20</td>
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<td>Criterion 7: Budget</td>
<td>5</td>
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<tr>
<td>TOTAL:</td>
<td>100</td>
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**Criterion 1: Grant Purpose (Value: 10 Points - Maximum word count 400)**

Applicants must write a one-page abstract that summarizes their proposed grant project and discusses how they will meet the overall purpose set for this funding opportunity to weave together inclusive transportation planning, development, and implementation that fully and meaningfully engage older adults, people with disabilities, and caregivers and a grassroots-driven mobility on demand solution that responds to local transportation barriers and issues and tests a standard way of sharing trip data to support coordination and mobility on demand.

*Note:* Funders are particularly interested in mobility on demand technology solutions that are transferable and scalable to other communities and across the United States. Applicants proposing to develop and implement an open source technology or work with a vendor that makes a commitment to make the integration code public will score more favorably.

**Criterion 2: Grant Description and Overall Approach (Value: 15 Points - Maximum word count 1600)**

Applicants must develop a written, detailed (though brief and to the point), description of their proposal to create an inclusively developed mobility on demand program in their community. Applicants should:

- In clear, specific, and concise language, describe the proposed project and identify the outcome(s) you expect to achieve. Include your reasons for seeking this grant funding and describe what you envision now as a MOD system in your
community. Be specific in identifying what you expect to achieve during the Planning Phase of this project to set the stage for moving toward an inclusively developed and supported MOD system in your community in the Implementation Phase.

• Discuss why this application was developed.
• Describe the local community to be impacted by the project, including its geographic designation as urban, suburban, rural, frontier, Tribal Nation, or a combination thereof (e.g., urban/suburban).
• Describe the population to be targeted as participants in the project as well as those who will benefit from it. Include information about the older population, the population of people with all and/or specific disabilities, and family caregivers (include any available data as well as descriptive information). Address how the target population is representative of the broader ethnic, racial, and language diversity in the community as a whole.
• Discuss the current transportation infrastructure, including the range of services available to serve the target population.
• Discuss the community transportation challenges that impact the mobility of older adults and people with disabilities, including their ability to access health care, education, employment, healthy foods, and social activities.
• Document the availability of data such as ridership data, unmet trip requests, wait time, and data that will demonstrate the need for a mobility on demand initiative to serve the needs of people with disabilities, older adults, and caregivers.
• Describe current and recent past efforts to promote accessibility, facilitate interconnection among different transportation modes and providers, and make other improvements, including any MOD projects to better serve older adults and/or people with disabilities. Include a discussion of challenges and barriers that have impeded your efforts.
• Describe the proposed solution to pilot the Transactional Data Specification to exchange trip information among two or more demand-responsive transportation providers in an automated fashion.
• Describe how the proposed solution is highly transferable (technology solution made publicly available through open source or publicly available software, data specifications, and application programming interfaces (APIs). Where the proposed solution is integrated with proprietary software packages, does the application include a commitment letter from the vendor (RouteMatch, Trapeze, etc.) that it will make the integration code public for others to use in future integrations of the transactional data specification?
• Discuss why this project will succeed. Include in your response a description of current support in the community among both participants and stakeholders for this effort and plans to build support for inclusive planning.
Criterion 3: Administrative Roles of the Applicant Organization, Participants, and Partners (Value: 15 Points - Maximum word count 800)

Applicants should:

- Briefly discuss the applicant organization’s qualifications to lead the proposed project, including past work to improve transportation and experience with inclusive planning.
- Identify the primary participants and key coordinated transportation partners who have been and will be involved in the project and describe the roles they will play in the project. Identify participants and partners who were involved in developing the application and specify how they were involved.
- Discuss why these particular participants and partners were invited to participate. Include in your response:
  - How and why were they selected?
  - Are participants (including those already involved as well as those to be recruited) representative of the target population? If not, what will you do through this project to ensure participation of underrepresented groups? Discuss how the project will address the ethnic and racial diversity of the community through the inclusion of these groups in the project.
  - Do the applicant organization and partners represent all required transportation, aging, and disability organizations in the community? Note: If the primary public transportation provider is not included, explain why not and discuss how you will be able to achieve project goals without such participation.
  - What do participants and partners bring to the table, including experience working on coordinated inclusive transportation planning?
  - What are the anticipated benefits of their involvement?
- Include the required letters of commitment from at least three key participants and three key stakeholders and attach them to the application.
- Include the required letters of support from at least three (no more than five) of a combination of any of the following: state agencies (e.g., Unit on Aging, Disability, DD Council, Medicaid), elected officials, community/state leaders, and transportation funders.

Criterion 4: Inclusion: Engaging Participants (Value: 20 Points - Maximum word count 800)

Applicants should convey their understanding of and plans to meaningfully engage participants in their project.

- Describe the current state of inclusive planning practice, including past and current efforts to engage older adults and people with disabilities in transportation planning, development, and evaluation.
• Discuss how the project will use a human-centered design approach that fully and meaningfully engages people with disabilities and older adults in all aspects of the work.
• Identify where the applicant community is on the Pathway to Inclusion, as identified by participants, partners, and the applicant. Is there agreement on the level? Discuss why the community is at the level identified by participants, partners, and the applicant organization, including examples of past inclusive activities.
• Describe the inclusive practices that will be implemented through this project to achieve MOD; how the applicant, partners, and participants will work together to achieve greater inclusion (specify your goal on the Pathway to Inclusion); and how inclusive practices will be incorporated into the project’s planning, development, and implementation activities.
• Discuss the strategies you will use to encourage and accommodate participants’ involvement.

Criterion 5: Leadership in Inclusive Transportation Planning (Value: 15 Points - maximum word count 600) Applicants should expand on information provided in response to Criterion 2 to fully discuss the knowledge, experience, and connections of the applicant organization, participants, and partners to the local community’s coordinated transportation planning infrastructure.

• If these connections are lacking or need improvement, discuss how the proposed project will remedy the situation.
• All applicants must identify strategies to:
  o Empower participants and partners to take an active and meaningful role in the MOD planning and implementation process; and
  o Ensure that the proposed project can succeed in engaging relevant community leaders to support this effort.

Criterion 6: Project Work Plan (Value: 20 Points - Maximum word count 1400) Applicants should discuss how they will use inclusive planning and a human-centered design process to identify the need for and develop and implement a new, expanded, or refined mobility on demand effort in their designated community. Specifically, describe how:

• The needs of the intended users of any mobility on demand projects will be discovered and documented. Specify the needs and desires of intended users that already have been identified and how this information has informed your project proposal.
• Needs identified through this project, including previously identified needs, will be refined into actionable concepts.
• Potential creative innovative solutions will be selected.

Criterion 7: Budget (5 points)

The budget must be reasonable and support planned activities and must clearly show how funds will be spent within the time frame for this grant opportunity. Budget categories include personnel, meeting/training costs (which may include the costs of transporting participants to attend meetings or participate in focus groups or community meetings), staff travel, consultant fees and travel, other direct costs (e.g., telephone/fax, printing, office space) and indirect costs (with documentation regarding the indirect rate). If matching funds are provided, the budget form includes a column to specify how those funds will be spent. Applicants must identify total grant funding in the space provided on the budget form: funds to be awarded plus any matching funds.

Page 2 of the Budget Narrative requests specific information regarding in-kind support to be provided by the applicant organization (e.g., supplementing staff salaries) and/or key partners. In-kind support may include providing staff support, free meeting space, meeting refreshments, postage, etc. Matching funds and in-kind support are encouraged but not required.

Please note: Technology purchases may be considered acceptable budget items if used for the purpose of facilitating full participation in the inclusive planning process or for prototyping.

Selected grantees are expected to negotiate their final budgets with the project partners to ensure that funds are appropriately targeted to support grant activities and are reasonably expected to be expended within the 18 months’ time limit of the grant.

Grant Selection
Each grant application will be reviewed independently by at least two members of the Grant Review Committee. Scores will be tallied to identify applicants with the highest scores. Project partners will conduct an additional review of the high-scoring applications, taking into consideration the need to ensure geographic diversity in terms of different areas of the country (e.g., Midwest, Southeast) as well as a mix of rural, urban, suburban, and mixed (e.g., rural/urban, suburban/urban) areas and include a mix of different levels of experience in inclusive transportation planning and MOD among the grantees.