CALL FOR PROJECTS GUIDELINES

Introduction

The San Mateo County Transportation Authority (TA) is pleased to announce the Cycle 2 Call for Projects (CFP) for the Alternative Congestion Relief and Transportation Demand Management (ACR/TDM) Program. The goal of this program is to encourage the use of sustainable transportation options and enhance mobility across San Mateo County.

Application Materials

The CFP packet consists of these guidelines, application instructions, and the application templates. These documents and other related reference materials can be found at the following link: https://www.smcta.com/whatshappening/Call_for_Projects.html

Schedule

Call for Projects Issued	June 10, 2024
Call for Projects Workshop	June 13, 2024
Deadline for "Notice of Intent to Submit" Survey for Pre-Submittal Meeting Requests	July 3, 2024
Deadline for "Notice of Intent to Submit" Survey for Upload Link Only	July 31, 2024
Project Applications Due	**August 30, 2024**
Evaluation Period	September 2024
Draft Recommendations/TA Board Approval	November/December 2024

Application Submittal Instructions

Step 1 – Pre-Submittal Mandatory Meetings: Please fill out the [Notice of Intent to Submit Survey](#) for each individual proposed application. The pre-submittal meetings are required if you wish to use the equity-based reduced match requirement or would like to request TA Technical Assistance staff and consultant support to implement a project. The survey will allow you to request a 30-minute meeting will be your opportunity to review project/program/plan eligibility and location, confirm matching eligibility (standard or equity-based), and provide the information necessary to receive Drobox upload link to folder specifically for your project information. The survey must be filled out by July 3rd to request the optional pre-submittal meeting or by July 31st to receive a Dropbox upload link. After that date, please email Patrick Gilster directly.

Step 2 – Get Upload Submission Link: After filling out the survey, TA staff will provide the primary point of contact with a Dropbox link where applicants can upload their application and supporting materials.

Step 3 – Upload and Confirm: Applicants must submit one electronic copy of the completed application with all required attachments by uploading all materials to a specific Dropbox link that will be provided. Completed applications must be received no later than *August 30, 2024 by 4:00 PM*. Late or incomplete applications will not be accepted. It is the applicant's responsibility to check with TA staff to confirm the receipt of applications prior to the submission deadline.

Primary TA Contact Information   Patrick Gilster, Director of Planning & Fund Management
Email: gilsterp@samtrans.com Phone: 650-207-5643

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Background

The TA's Measure A half-cent sales tax for transportation programs and projects was reauthorized in 2004 for a period of 25 years by the voters of San Mateo County. Measure A took effect on January 1, 2009 and expires on December 31, 2033. Contained within the Measure A Transportation Expenditure Plan is a program category that allocates one percent of the generated funds to Alternative Congestion Relief, which is aimed at commute alternatives and planning work to support Intelligent Transportation Systems.

On November 6, 2018, the voters of San Mateo County approved Measure W, a new 30-year half-cent sales tax for transportation programs and projects that took effect July 1, 2019 and expires on June 30, 2049. The Measure W Congestion Relief Program includes the Countywide Highway Congestion Improvements program category. Through the 2020-2024 TA Strategic Plan, the TA developed a competitive TDM subcategory to encourage programs and projects that reduce highway congestion including, but not limited to, non-Single Occupant Vehicle trips and off-peak trip demand. Unlike the ACR category in Measure A, projects that qualify for Measure W TDM funds must show a nexus to the highway system. Measure W commits one percent of total annual Measure W funds for TDM projects.

In January 2022, The TA adopted its first ACR/TDM Plan that was developed to guide investment decisions and funding allocations for a combined Measure A ACR and Measure TDM Program. The ACR/TDM Plan provides a vision for the ACR/TDM Program, program guidelines, example eligible projects/programs, and evaluation criteria for selection of projects. This CFP combines funding dedicated to ACR/TDM competitive programs from Measures A & W to streamline the application, evaluation, and grant administration process.

Vision, Goals, and Program Sub-Categories

The ACR/TDM Plan outlines the program vision as:

Alternative Congestion Relief (ACR) and Transportation Demand Management (TDM) are strategies that encourage the use of sustainable transportation options and enhance mobility. ACR/TDM initiatives work toward ensuring that people's trips are safe, reliable, and convenient while discouraging driving, managing congestion, and reducing Vehicle Miles Traveled (VMT).

Projects funded through this CFP must meet the following goals:

- ✓ Provide Congestion Relief
- ✓ Increase Sustainable Transportation Options
- ✓ Promote Sustainability & Health
- ✓ Encourage Economic Development Opportunities
- ✓ Invest Funding Equitably

The ACR/TDM Plan established program sub-categories to guide investment decisions:

Competitive ACR/TDM Program Sub-categories

Intelligent Transportation Systems (ITS) Planning & Design	Funding for the planning and design of ITS systems for improved highway/transit capacity.
TDM Planning	Funding for developing TDM plans and policies that identifies projects and actions for local jurisdictions to lead.
TDM Competitive Projects	Funding for projects, programs, or subsidies that support ACR/TDM goals.

Direct ACR/TDM Program Allocations

Commute.org Operations	Funding to continue the TA's historical investment in Commute.org's operations and programs
Countywide TDM Monitoring Program (managed by Commute.org)	Funding to create and manage a Countywide TDM Monitoring Program through Commute.org to assist with monitoring of C/CAG's TDM requirements for development

Funding

Available Funding

A total of up to approximately $6 million in Measure A & W ACR/TDM Program Category funds may be made available for Fiscal Year (FY) 2025/2026. The competitive subcategories are intended to fund projects, programs, or plans that best meet the program evaluation criteria. The TDM Competitive Projects sub-category also features investment goals for small/coastal jurisdictions and mid/large jurisdictions to further equitable investments geographically across San Mateo County.

The Measure A ACR category also provides direct funding to Commute.org to support their operations and to lead the Countywide TDM Monitoring Program (under development) which will be allocated each year separately from the Call for Projects.

For Cycle 2, the following total funding will be made available for projects in each of the ACR/TDM competitive subcategories:

- ITS Planning & Design: $2.2 million (Max request up to $200k)
- TDM Competitive Projects: $3.2 million (Max request up to $200k)
- TDM Planning: $670,000 (Max request up to $100k)

Key Program Guidelines

Call for Projects Guidelines

Guideline Category	Requirement
Matching Funds	**Standard Match:** A minimum 10% match is required for all applications regardless of sub-category. TA Local Streets and Transportation funds are an eligible source of matching funds. Funding from other TA funding categories, however, is not considered as eligible match. The TA will not consider previously incurred costs or previously expended or encumbered funds towards the matching requirement. Staff time in-lieu match is also not accepted. **Equity Priority Locations:** A reduced 5% match may be requested in advance of submitting for project/program applications located in MTC Equity Priority Communities, Re-Imagine SamTrans Equity Priority Areas, or C/CAG Comprehensive Bicycle and Pedestrian Equity Focus Areas.
Maximum Project Award	TDM Plan Sub-category - $100,000 maximum ITS & TDM Competitive Projects - $200,000 maximum
Number of Applications	Eligible sponsors are limited to submitting up to three applications per Call for Projects cycle total across all sub-categories.
Timely Use of Funds	Projects or programs must complete a funding agreement, begin work within one-year of an award, and expend funds within two years of the executed funding agreement.
Reduced Awards	Due to funding limitations, proposals that are selected for funding may receive less than the amount original requested. In those cases, TA staff will work with the sponsor to determine if the proposed projects or programs are still viable with a reduced award.
Eligible Staff Costs	ACR/TDM funding cannot be used to solely fund a staff person. Staff costs are eligible to include as part of implementing a project or program but cannot exceed 10% of a project or programs total value. For example, a sponsor can apply for $100,000 in transit pass subsidies and may include up to $10,000 in administrative staff time to implement the program.

Eligibility

Eligible Sponsors (Applicants)

Eligible project sponsors for ACR/TDM funds are limited to the agencies listed below. Jurisdictions with an (*) are eligible for the small/coastal jurisdiction set aside goal in the TDM Competitive Projects sub-category. The County of San Mateo is only eligible for the small/coastal jurisdiction set aside if a proposed project is intended to be implemented in an individual unincorporated community and is not countywide in nature.

- Town of Atherton*
- City of Belmont
- City of Brisbane*
- City of Burlingame
- Town of Colma*
- City of Daly City
- City of East Palo Alto
- City of Foster City
- City of Half Moon Bay*
- City of Hillsborough*
- City of Menlo Park
- City of Millbrae

- City of Pacifica*
- Town of Portola Valley*
- City of Redwood City
- City of San Bruno
- City of San Carlos
- City of San Mateo
- City of South San Francisco
- Town of Woodside*
- County of San Mateo*
- C/CAG
- Commute.org

Other interested agencies may partner with an eligible sponsor to be the implementing party; however, only eligible project sponsors may submit applications.

Eligible Projects

The ACR/TDM Program provides funding for projects that support network efficiency (ITS and transit), congestion demand relief, and sustainable transportation modes. Please see Attachment A for the full list of example eligible project types identified in the ACR/TDM Plan. Note that projects funded by Measure W must show a nexus to highway congestion relief or VMT reduction whereas Measure A does not have this requirement.

Evaluation and Scoring Rubric

The ACR/TDM Plan established the evaluation criteria to be used during Call for Projects and was expanded to include the full scoring rubric which can be found in the corresponding Evaluation and Scoring document on the Call for Projects webpage.

The TA will insert the quantitative results into each applicable project application based on the outputs from the web-based evaluation tool after the project application is submitted.

Required Application Attachments

Attachment A: Cover Letter

The one-page cover letter should include:

- ✓ Sponsor Agency letterhead
- ✓ Project title
- ✓ Funding request
- ✓ Local match amount
- ✓ Certification of project cost estimate
- ✓ Non-supplantation of Measure A & W funds
  - o Sponsors must certify that Measures A & W funds awarded in this cycle will not replace existing funds per the non-supplantation of funds requirement in this grant program.
- ✓ Signature by an authorized representative of the agency with name, title, and date.
  - o Electronic signatures are permitted.

Attachment B: Governing Board Resolutions

Applicants should include a governing board resolution substantially similar to Attachment B, supporting the project application, certifying the non-supplantation of funds, and verifying the commitment of matching funds. If the applicant agency is not able to obtain a governing board resolution prior to the application deadline, the application will be accepted on an interim basis until an adopted governing board resolution can be obtained. Approved governing board resolution must be submitted to the TA no later than August 30, 2024 with the application.

Attachment C: Letters of Support/Community Engagement Documentation

Applicants should include letters of support and/or documentation of community engagement, which may include public notices, sign-in sheets, photos, meeting notes/minutes.

Attachment D: Cost Estimates

For Infrastructure requests, attach detailed cost estimates that includes a table of construction items, quantities, unit costs, total item cost, contingency, and total cost.

For planning or programmatic requests, include labor costs (staff time) for agency and consultant (if applicable) per task and total value of subsidy or other items to be purchased.

Include and itemize direct costs such as travel, equipment, and supplies per task and total.

Attachment E: Photos and Documentation (if applicable for submission)

All infrastructure project requests should provide raw photos of existing conditions at the proposed site location. Upon completion of the project, pictures of the final constructed project must be provided prior to submitting for final reimbursement.

For planning or programmatic requests, pictures should be provided of any events or distribution activities prior to submitting for final reimbursement.

Other Policies/Guidelines for This Call for Projects

Funding Agreements

All sponsors who receive an award will be required to enter into a funding agreement with the TA. All agreements must be executed within one-year of the TA Board allocation date. No extensions will be granted for executing funding agreements and any funding awards without an agreement after one-year will automatically be returned to the ACR/TDM available funding pot.

A draft of the funding agreement will be made available to project sponsors following project awards. All funding agreements will be executed via DocuSign.

Timely Use of Funds

Projects must remain active to retain allocated funding. ACR/TDM Program funds will be expected to be fully expended within two years of the executed agreement date. In the event that the scope of work cannot be completed within the defined period (two years), the sponsor may request a time extension by providing a letter to the TA justifying the need for additional time. If the TA agrees to the extension, then an amendment to the funding agreement will be executed.

Eligible Costs

Funds shall be used only for direct eligible costs to complete the scope of work. Development of proposals/applications and the review of funding agreements are not eligible for ACR/TDM Program funding. All phases work for infrastructure projects are eligible if construction funds are requested.

Audits

The TA, or its authorized agents, reserve the right to audit the project sponsor to ensure compliance with the terms and conditions stipulated in the sponsor's funding agreement.

Progress Reporting

Quarterly Reports

Sponsors will be required to monitor and report project status during the implementation of the project scope of work. Monitoring and reporting requirements will vary by type of project, plan, or program and should be discussed with TA staff during the mandatory pre-submittal meetings. Sponsors will need to specify the monitoring approach as part of the application.

Progress reports will be due on a quarterly basis after the execution of a funding agreement within 30 days of the end of each quarter. A sponsor must be in good standing with the submittal of progress reports (within 30 days after the end of each quarter) prior to receiving reimbursement for eligible scope of work expenses.

Under-subscription

If funds are undersubscribed in this cycle, the TA reserves the right not to fund project applications which do not satisfy the project merit evaluation criteria.

Cost Increases

Projects which are allocated funds are not guaranteed to receive additional funds if the cost of the project scope increases. It will be the responsibility of the sponsor to take the lead in identifying and securing additional funds. Sponsors can work with the TA and other funding entities to secure additional funds, as well as apply for additional TA funds through subsequent funding cycles.

Non-supplantation of Funds

Sponsors are required to certify funds awarded in this cycle will not replace existing funds. The non-supplantation of funds must be certified in the cover letter to this application as well as in the governing board resolution.

Project Signage

All press releases, project fact sheets, documents, websites, and communication materials produced for projects receiving an award shall include the following statement: **This project was made possible in part by sales tax dollars provided by the San Mateo County Transportation Authority.** If funds are used for capital project, the project sponsor must maintain a project sign identifying the TA as a funding partner for the project.

Letter of No Prejudice

Project sponsors may request a letter of no prejudice from the TA to incur costs on a project with the understanding that the costs incurred before receiving the award may be reimbursable as eligible expenses or may be eligible for credit toward local matching share if the project is approved for funding at a later date. Any funds expended prior to the approval of a letter of no prejudice will not be considered as matching funds.

Scope Changes

Project sponsors seeking a change in project scope after TA Board approval of the allocation must obtain approval from the TA prior to scope modifications or risk losing the funds. Costs incurred that are not part of the project scope are ineligible for reimbursement.

Incomplete Projects

If the project is not completed as awarded, the project sponsor may be required to fully or partially repay TA funds commensurate with the failure to complete the project.

TABLE 5-2: FULL ACR/TDM PROGRAM & PROJECT INVENTORY FOCUS

	Measure A	Measure W
Network Efficiency (ITS and transit)	**ITS Sub-category Planning & Design Eligible Projects:** ‣ Mobility Hub Plan ‣ Transit Signal Improvements ‣ Data Purchasing ‣ Real Time Information ‣ Dynamic Parking Signs ‣ AV and Shared AV (pilot programs) **Competitive Funds:** ‣ Transit Passes ‣ Charging stations (infrastructure as part of mobility hubs) ‣ Transit Signal Improvements (Infrastructure) ‣ Transit Stop & Access Improvements	‣ Transit Passes ‣ Charging stations (infrastructure as part of mobility hubs) ‣ Transit Signal Improvements (Infrastructure) ‣ Transit Stop & Access Improvements
Congestion Demand & Relief (Plans and other behavior shifts)	‣ Technical Assistance ‣ Planning Bench ‣ Countywide Taskforce and/or Workshops ‣ Monitoring (through Commute.org) and TDM Clearinghouse ‣ Lifeline/Equity-focused On-Demand Rideshare Subsides ‣ Safe Routes to School (crossing & safety improvements)* ‣ Carpool or Vanpool Programs ‣ Affordable Housing Carshare ‣ Telework Incentives	‣ Climate Action Plans (with transportation elements) ‣ Safe Routes to School (crossing & safety improvements)* ‣ Carpool or Vanpool Programs ‣ Affordable Housing Carshare ‣ Telework Incentives ‣ Planning Work (includes City TDM Plans & Requirements, TMA Feasibility Studies, Curbside/Parking Management Plans or Reduction Requirements)
Sustainable Transportation Modes (Bikes and pedestrians)	‣ E-Bike/Scootershare programs ‣ E-Bike & E-Scooter subsidies ‣ Bike Charging Station ‣ Bike and Pedestrian Crossings* ‣ Bike and Pedestrian Access & Wayfinding* ‣ Bike Parking & Repair* ‣ Countywide Bikeshare	‣ E-Bike/Scootershare programs ‣ E-Bike & E-Scooter subsidies ‣ Bike Charging Station ‣ Bike and Pedestrian Crossings* ‣ Bike and Pedestrian Access & Wayfinding* ‣ Bike Parking & Repair* ‣ Countywide Bikeshare ‣ Bike Parking Plan ‣ Wayfinding Plan

Denotes spot treatment that wouldn't compete in the Bike/Pedestrian CFP