

Measure BB Program Guidelines
Community Development Investments Program
Improving Transit Connections to Jobs and Schools

A. PURPOSE

The 2014 Transportation Expenditure Plan (TEP) establishes a total of 4 percent of net sales tax revenue, for the development and implementation of the Community Development Investments Program (CDIP). Community developments are strengthened when enhanced by transportation choices that provide expanded access to residential developments, jobs and schools. The CDIP will support existing and new transportation infrastructure improvements that will enhance access and provide increased connectivity to and between job centers, schools, transportation facilities, community centers, and residential developments. Investments include capital projects, programs, plans and studies which serve to achieve the objectives of the CDIP, including but not limited to improvements to BART station facilities, bus transfer hubs, bicycle/pedestrian infrastructure, local streets and roads, and transit that facilitate transit-oriented growth.

B. PROGRAM OBJECTIVES

The program objectives are to make the existing transit system more efficient and effective and increase ridership at transit facilities by:

- o Improving access to transit facilities for bicycle and pedestrian traffic by addressing connectivity, safety and/or circulation needs.
- o Connecting high density residential developments, job centers or schools to transit and encourage multi-modal access.
- o Providing shuttles that can more effectively meet transportation needs in areas that cannot be served efficiently or are not served by fixed route transit.
- o Promoting transportation that supports land use patterns that provide a mix of uses and greater density around transit or activity hubs.

C. PROGRAMMING METHODOLOGY

The CDIP funds will be distributed to specific investments on a discretionary basis as part of the development of the Alameda CTC Comprehensive

Investment Plan (CIP). Programming revenues are estimated over a five-year horizon and allocated in two-year cycles. To support the Program Objectives as outlined above, the following will apply:

1. Minimum Program Eligibility (MPE)
 - a. Projects must be sponsored by a public agency in Alameda County (cities, county and transit agencies).
 - b. Projects must be included in the Alameda CTC's Countywide Transportation Plan.
 - c. Shuttles must be available for use by all members of the public.
2. A minimum of 70 percent of available program funds will be specifically allotted to capital projects for infrastructure investments. The remaining 30 percent may be used in any category.
3. Award limitations will apply as follows:
 - a. Capital project award amounts will be limited by the programming fund estimate determined for a given award cycle and time period. Amounts will be programmed and allocated by phase, taking into consideration factors such as the remaining project phases, delivery risks to complete a phase and maximization of leveraging funding. Funding may be programmed to the following phases:
 - 1) Planning/Scoping/Conceptual Engineering
 - 2) Preliminary Engineering/Environmental Studies
 - 3) PS&E/Final Design
 - 4) Right-of-Way Acquisition and Engineering
 - 5) Utility Relocation
 - 6) Construction Capital and Support
 - b. Shuttles operations will be limited to a maximum award of \$500,000 per year, and will require a 50% match. Awards will be for a two-year period. Awards less than \$100,000 per year will be considered on a case-by-case basis. Funding may be programmed to the following phases:
 - 1) Feasibility
 - 2) Implementation/Operations
 - 3) Evaluation
 - 4) Monitoring

- c. Plans and Studies will be limited to a maximum award of \$100,000, and will require a 50% match. Requests for plans or studies that identify and prioritize specific improvements that support the Program Objectives will be considered on a case by case basis in consideration of countywide planning and study efforts lead by Alameda CTC and the extent to which the Program Objectives are met.
4. Projects and Programs that meet the MPE requirements and are recommended by Alameda CTC for non-Alameda CTC administered funds, such as One Bay Area Grant (OBAG), will receive first priority to secure these external funding commitments for Alameda County. The remaining eligible candidates will be further evaluated and prioritized for funding based upon the selection criteria for each project type as provided in Appendix A (Selection Criteria).
5. Award Stipulations
 - a. Within two months of funding approval, Project Sponsor must submit a resolution authorizing acceptance of the recommended funding award.
 - b. Enter into a Funding Agreement with Alameda CTC as detailed in Section D (Agreement and Performance Requirements).
 - c. Project Sponsor is required to provide the expertise and staff resources necessary to successfully deliver projects within the constraints of the funding source requirements.
 - d. Alameda CTC will not be responsible any cost overruns. Project Sponsor is responsible for cost increases or any additional funding needed to complete the project, including contingencies and matching funds.
 - e. Project Sponsor will adhere to the applicable policies of the Alameda CTC's adopted CIP. Attention is directed to the following policy subjects:
 - Deadline for Environmental Approval
 - Timely Use of Funds
 - Eligible Costs for Reimbursement
 - Local Contracting

D. AGREEMENT AND PERFORMANCE REQUIREMENTS

For each award granted, a Funding Agreement will be executed between Alameda CTC and the Project Sponsor. Payments to Project Sponsors will be made on a reimbursement basis and may be authorized only upon the execution of the Funding Agreement. The Funding Agreement will include, among other items:

- A Project Delivery Plan that includes a detailed project description, costs and funding by phase, and an implementation schedule with associated deliverables, or a Program Implementation Plan that includes a detailed program description, costs and funding by phase, and an implementation schedule
- Monitoring, reporting and audit requirements
- Requirement to adhere to all applicable regulations, including the American Disabilities Act
- Agreement to maintain the facility
- Agreement to acknowledge Measure BB funding on project signage

Capital projects will be delivered according to the approved delivery plan and programs will be implemented according to the program implementation plan as per the Funding Agreement. Unless otherwise provided for, any modification of the approved plan will require approval by Alameda CTC and the Funding Agreement amended accordingly. Project Sponsors will mitigate direct displacement of residential developments or jobs resulting from the project.

Funds for shuttles are provided for operations activities only and may not be used for maintenance or vehicle purchases. Shuttles will be required to meet baseline thresholds in any of the following categories:

- Ridership
- Operational performance
- Operations cost

Plans and Studies will be required to complete deliverable(s) as approved and within the established schedule.

Refer to Appendix B (Project/Program Eligibility Elements) for details of eligible and ineligible project/program elements.

APPENDIX A
SELECTION CRITERIA
(Category weights and criteria scoring details to be provided
during Project Nomination Period)

CAPITAL PROJECTS

Category	Criteria
<u>Benefits</u>	<p>Access Improvements</p> <ul style="list-style-type: none"> <input type="checkbox"/> Improve access to activity centers, central business districts, and employment centers <input type="checkbox"/> Improves transportation routes to schools <input type="checkbox"/> Serves a known or realistic level of demand in the community for transit services <p>Safety & Security</p> <ul style="list-style-type: none"> <input type="checkbox"/> Identifies safety concerns <input type="checkbox"/> Increases public safety through a reduction of risk of accidents for vehicles, bicycles, and/or pedestrians <input type="checkbox"/> Identifies known safety issues with a proven countermeasure to address the conflicts <input type="checkbox"/> Corrects a deteriorating condition/aging infrastructure <p>Connectivity/Gap Closures</p> <ul style="list-style-type: none"> <input type="checkbox"/> Enhances intermodal and multijurisdictional connectivity <input type="checkbox"/> Complements existing services (not duplicative) <input type="checkbox"/> Expands the transportation system, network, or service <p>Multimodal Benefits</p> <ul style="list-style-type: none"> <input type="checkbox"/> Identifies benefits to transit, bike, pedestrian and rail <input type="checkbox"/> Support multimodal transportation through coordination of improvements <input type="checkbox"/> Supports and implements Complete Streets Policies and Practices <p>Economic Growth</p> <ul style="list-style-type: none"> <input type="checkbox"/> Promotes job growth <input type="checkbox"/> Supports residential developments and/or jobs adjacent to transit
<u>Sustainability</u>	<ul style="list-style-type: none"> <input type="checkbox"/> Identifies funding sources and responsible agency for maintaining the transportation project after implementation/construction <input type="checkbox"/> Transportation project is identified in a long-term development plan
<u>Matching Funds</u>	<ul style="list-style-type: none"> <input type="checkbox"/> Commits other identified funds as project matching to the funds requested <input type="checkbox"/> External (i.e., non-Alameda CTC administered) fund type (regional, state, federal, local, private)
<u>System Efficiencies</u>	<ul style="list-style-type: none"> <input type="checkbox"/> Synergies with other projects (complements another on-going project)

SHUTTLES

	Existing Shuttles Criteria	New Shuttles Criteria
<u>Benefits(Needs)</u>	<p>Connectivity/Gap Closures/Access Improvements</p> <ul style="list-style-type: none"> <input type="checkbox"/> Connects, provides or improves access to activity centers, central business districts, schools, and employment centers <input type="checkbox"/> Serves a known level of demand in the community for transit services <input type="checkbox"/> Enhances multi-jurisdictional connectivity such as improving access to BART or trunk lines on AC Transit <input type="checkbox"/> Increase efficiency level of service or reduces travel time <p>Safety & Security</p> <ul style="list-style-type: none"> <input type="checkbox"/> Addresses an existing safety concern <p>Multimodal/ Environmental Benefits</p> <ul style="list-style-type: none"> <input type="checkbox"/> Identifies benefits to transit, bike, pedestrian <input type="checkbox"/> Shuttle accommodates bicycles <input type="checkbox"/> Promotes modal shifts that reduce dependency on motorized transportation <input type="checkbox"/> Provides congestion relief <input type="checkbox"/> Use of clean fuel vehicle(s) for service <p>Economic Growth</p> <ul style="list-style-type: none"> <input type="checkbox"/> Supports residential developments and/or jobs adjacent to transit Planned population densities Planned employment densities or trends 	<p>Connectivity/Gap Closures/Access Improvements</p> <ul style="list-style-type: none"> <input type="checkbox"/> Connects or provides access to activity centers, central business districts, schools, and employment centers <input type="checkbox"/> Serves a realistic level of demand in the community for transit services <input type="checkbox"/> Enhances multi-jurisdictional connectivity such as improving access to BART or trunk lines on AC Transit <p>Safety & Security</p> <ul style="list-style-type: none"> <input type="checkbox"/> Addresses an existing safety concern <p>Multimodal/ Environmental Benefits</p> <ul style="list-style-type: none"> <input type="checkbox"/> Identifies benefits to transit, bike, pedestrian <input type="checkbox"/> Shuttle accommodates bicycles <input type="checkbox"/> Promotes modal shifts that encourage less dependency on motorized transportation <input type="checkbox"/> Provides congestion relief <input type="checkbox"/> Use of clean fuel vehicle(s) for service <p>Economic Growth</p> <ul style="list-style-type: none"> <input type="checkbox"/> Supports residential developments and/or jobs adjacent to transit Planned population densities Planned employment densities or trends

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	Existing Shuttles Criteria	New Shuttles Criteria
<p><u>Readiness</u></p>	<p>Service plan clearly demonstrates how the shuttle service will be delivered for the funding period including:</p> <ul style="list-style-type: none"> a. Service area (routes/maps, destinations served) b. Specific rail stations, ferry or major transit centers served. c. Coordination with scheduled transit service d. Marketing plan/activities e. Service Provider f. Administration and oversight plan g. Monitoring/evaluation plan/activities (performance data, complaints/compliments, surveys) h. Co-Sponsors/stakeholders i. Ridership characteristics: e.g. commuter/ employees, seniors, students, etc. j. Any significant changes to existing service <p>Solid funding plan with budgeted line items for:</p> <ul style="list-style-type: none"> a. Contractor (operator/vendor) cost b. Fuel c. Insurance d. Administrative (Staff oversight) e. Other direct costs (e.g. marketing) f. Total operating cost g. Notes/exceptions (e.g. if there are projected differences between the 1st and 2nd year costs) 	<p>Service plan clearly demonstrates how the shuttle service will be delivered for the funding period including:</p> <ul style="list-style-type: none"> a. Service area (routes/maps, destinations served) b. Specific rail stations, ferry or major transit centers served. c. Coordination with scheduled transit service d. Marketing plan/activities e. Service Provider f. Administration and oversight plan g. Monitoring/evaluation plan/activities h. Co-Sponsors/stakeholders i. Surveys/studies on ridership characteristics: e.g. commuter/ employees, seniors, students, etc. <p>Solid funding plan with budgeted line items for:</p> <ul style="list-style-type: none"> a. Contractor (operator/vendor) cost b. Fuel c. Insurance d. Administrative (Staff oversight) e. Other direct costs (e.g. marketing) f. Total operating cost.

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	Existing Shuttles Criteria	New Shuttles Criteria
<u>Sustainability/ Effectiveness</u>	<input type="checkbox"/> Shuttle is included in an adopted local, special area, county or regional plan <input type="checkbox"/> Coordination with partners local community and governing body support (Letters of support from stakeholders) <input type="checkbox"/> Cost savings demonstrated through sharing of resources (shuttle operator provides reduced rates if service used for peak and off-peak service) <input type="checkbox"/> Annual average operating cost per passenger for the prior 12 months <input type="checkbox"/> Annual average passengers per revenue vehicle hour of service for the prior 12 months <input type="checkbox"/> Service links with other fixed route transit (more points for higher ridership routes) <input type="checkbox"/> Experience of implementer <input type="checkbox"/> Does not duplicate an existing transit service	<input type="checkbox"/> Proposed shuttle is included in an adopted local, special area, county or regional plan <input type="checkbox"/> Coordination with partners Local community and governing body support (Letters of support from stakeholders) <input type="checkbox"/> Proposed cost savings demonstrated through sharing of resources (shuttle operator provides reduced rates if service used for peak and off-peak service) <input type="checkbox"/> Projected ridership, operating costs, and revenue vehicle hours of shuttle service to be provided in the first and second years of shuttle service. <input type="checkbox"/> Service links with other fixed route transit (more points for higher ridership routes) <input type="checkbox"/> Experience of Sponsor <input type="checkbox"/> Identifies funding or action plan to sustain operations after implementation <input type="checkbox"/> Does not duplicate an existing transit service
<u>Matching Funds</u>	<input type="checkbox"/> Commits other identified funds as project matching to the funds requested 50% to 75% ≥75%	<input type="checkbox"/> Commits other identified funds as project matching to the funds requested 50% to 75% ≥75%
<u>System Efficiencies</u>	<input type="checkbox"/> Synergies with other projects/programs	<input type="checkbox"/> Synergies with other projects/programs

APPENDIX B PROJECT/PROGRAM ELIGIBILITY ELEMENTS

TABLE A: Example Eligible Project/Program Types	
Category	Project/Program Types ¹
Capital Projects	
Transit	Station improvements including plazas, station access, pocket parks, parking lots and structures
Local Streets and Roads	Streetscape projects associated with high density developments and near transit facilities with sample elements such as pedestrian street lighting, bulb outs, crosswalk and sidewalk improvements, new striping for bicycle lanes and road diets, way finding signage and bus shelters
Bicycle/Pedestrian	Bikeways and bike-transit facilities, bicycle/pedestrian paths and bridges, safe routes to transit, bicycle parking
Programs	
Transit Operations	Shuttles
Plans and Studies	
Plans and Studies (Transportation)	Master plans, feasibility studies

Notes:

1. Highway, Goods Movement, Transportation Demand Management/Education Outreach, Local Streets and Roads and Highway Operations are not anticipated to be significant contributors to the CDIP.

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TABLE B: Eligible Project/Program Costs		
Project Category/Phase	Eligible	Not Eligible
CAPITAL PROJECTS	<ul style="list-style-type: none"> • Park-and-ride facility improvements • Passenger rail station access and capacity improvements • Development and implementation of transit priority treatments on local roadways 	<ul style="list-style-type: none"> • Non-transportation related construction such as office spaces within transit facility for specific purpose of lease or retail • Site preparation work such as sewer, cable installation, etc. unless as part of a phased implementation of the project construction
Equipment/Rolling Stock Acquisition	<ul style="list-style-type: none"> • Equipment that is attached to a facility and integral to the benefit of the facility (ie: EV charging stations) 	<ul style="list-style-type: none"> • Rolling stock may count towards Sponsor project contributions; however, not reimbursable under this program
PROGRAMS		
Implementation/ Operations/ Maintenance	<ul style="list-style-type: none"> • Marketing expenses • Education • Enforcement 	<ul style="list-style-type: none"> • Vehicle purchases • Routine maintenance • Promotion program giveaways including food, etc.
Evaluation/ Monitoring		<ul style="list-style-type: none"> • Purchase of general staff equipment
PLANS/STUDIES	<ul style="list-style-type: none"> • Coordinated efforts in conjunction with any designated public entity having jurisdiction within Alameda County. 	<ul style="list-style-type: none"> • Studies that extend beyond Alameda County other than to establish contributing impacts

Note: This table is to be used in conjunction with CIP policy on Eligible Costs for Reimbursement.