



Making Efficient + Responsible Investments In Transit

MERIT – Capital Assistance

Overview and Proposed Policy Changes

Daniel Sonenklar, Statewide Transit Planning Manager
Transit Service Delivery Advisory Committee (TSDAC)
April 8, 2022



Capital Assistance Program Overview



Making Efficient + Responsible Investments In Transit

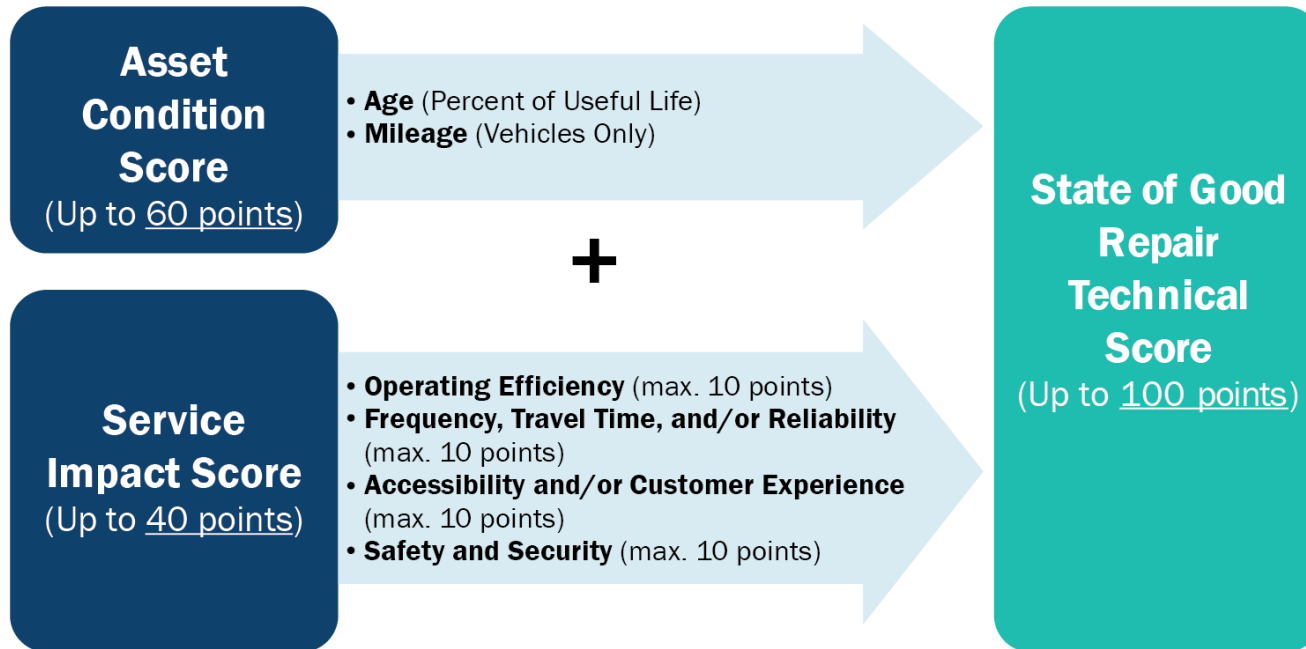
Capital Assistance Prioritization Process

- 1. Projects are filtered into 3 categories, by project type:**
 - » State of Good Repair, Minor Enhancements, and Major Expansions
- 2. Projects are screened for eligibility**
- 3. Eligible projects are scored according to the methodology outlined in this presentation for each project type**
- 4. Projects are ranked according to scoring**
- 5. Funding is allocated to those that meet or exceed the scoring threshold for each category**
 - » NOTE: The scoring threshold is dynamic and will be based on the pool of applications received and funds available

Capital Assistance Project Types:

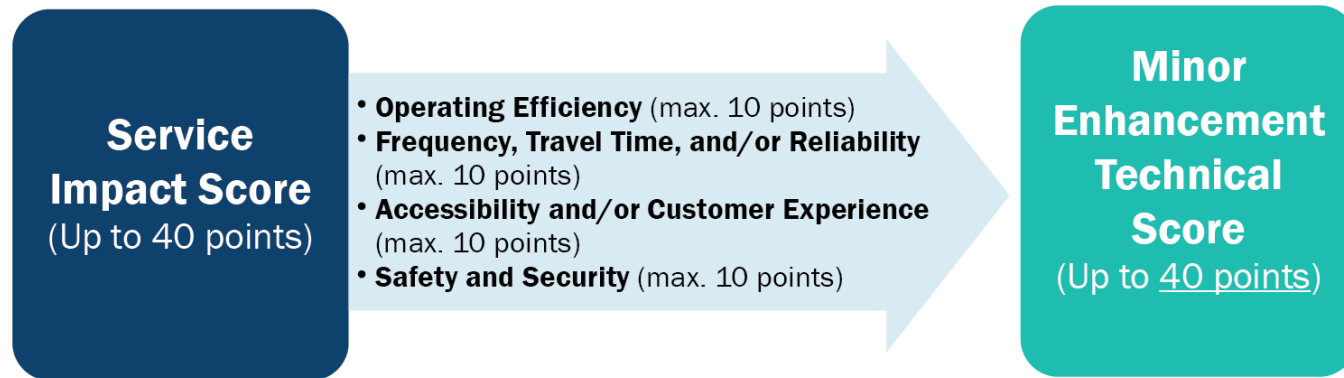
- **State of Good Repair (SGR)** [up to 68% match] - Projects or programs to replace or rehabilitate an existing asset
- **Minor Enhancements (MIN)** [up to 68% match] - Projects or programs to add capacity, new technology, or a customer facility meeting the following criteria:
 - » Total project cost is \$2 million or less; or
 - » For expansion vehicles, ≤ 5 vehicles or $\leq 5\%$ of the fleet size, whichever is greater
- **Major Expansions (MAJ)** [up to 50% match] - Projects or programs to add, expand, or improve service with:
 - » Total project cost exceeding \$2 million; or
 - » For expansion vehicles, > 5 vehicles or $> 5\%$ of the fleet size

Scoring: State of Good Repair (SGR)



State of Good Repair projects are evaluated considering asset condition (60 points) and service impact (40 points). The combined score from the two criteria adds up to 100 points.

Scoring: Minor Enhancements (MIN)



Minor enhancement projects are prioritized solely on service impact considerations, with projects receiving up to 40 points.

Asset Condition Score (SGR Only)

- **For vehicles: The asset condition rating score is the average of the age and mileage-based scoring systems - 50% mileage and 50% age**
- **For non-vehicle assets: Only the age score is used**

NOTES:

- » Asset age and mileage are compared against the Expected Service Life (ESL), which is the FTA standard for minimum service life of that type of asset
- » Each individual vehicle that is being replaced receives a score, while nonvehicle assets such as facilities are expected to be rated as one project

Asset Condition Score (SGR Only)

- The following table shows the points received for Age and Mileage
- Points are awarded to assets that have reached or exceeded 95% of their Estimated Service Life (ESL) for age or mileage

Age of Asset Relative to Service Life	Points	Mileage of Vehicle Relative to Service Life	Points
< 95% of ESL Age	0	< 95% of ESL Mileage	0
+/- 4.9% ESL Age	30	+/- 4.9% ESL Mileage	30
5-9.9% > ESL Age	35	5-9.9% > ESL Mileage	35
10-19.9% > ESL Age	40	10-19.9% > ESL Mileage	40
20-29.9% > ESL Age	45	20-29.9% > ESL Mileage	45
30-39.9% > ESL Age	50	30-39.9% > ESL Mileage	50
40-49.9% > ESL Age	55	40-49.9% > ESL Mileage	55
50% or more > ESL Age	60	50% or more > ESL Mileage	60

Service Impact Score (SGR & MIN)

- **Service impact considers the impact that the asset will have on service, and to what extent an asset affects the rider experience**
- **Measuring service impact is a qualitative exercise**
 - » Points are assigned based on the determined level of impact to service quality by project subtype
 - » Additional points are available based on specific characteristics of each project
- **There are four criteria which can each receive up to 10 points:**
 - » Service Frequency, Travel Time and Reliability.
 - » Operating Efficiency.
 - » Service Accessibility and/or Customer Experience.
 - » Safety and Security.

Service Impact Score (SGR & MIN)

- **Points are assigned initially based on the default rating for each criterion:**
 - » **High = 8 points**
 - » **Medium = 5 points**
 - » **Low = 2 points**
 - » **No Impact = 0 points**
- **Projects automatically receive the minimum score for the criterion based on the default values for each impact level**
 - » For example, a project ranked as high impact for the operating efficiency criterion would automatically receive 8 points for the criterion

Service Impact Score (SGR & MIN)

- Default Service Impact Condition Score Schedule**

Primary Project Types	Secondary Project Types	Operating Efficiency	Frequency, Travel Time and/or Reliability	Accessibility and/or Customer Experience	Safety and Security	Total Default Score
Vehicles	Revenue Vehicles	High Impact	High Impact	High Impact	High Impact	32
Vehicles	Overhaul/Engine Replacement	High Impact	High Impact	Medium Impact	High Impact	29
Customer Facilities	Transit Centers/Stations	Medium Impact	Medium Impact	High Impact	Medium Impact	23
Maintenance Equipment & Parts	All	Medium Impact	Medium Impact	Medium Impact	High Impact	23
System Infrastructure	All	High Impact	Medium Impact	Medium Impact	Medium Impact	23
Technology/Equipment	Onboard Systems—ITS/Communications	Medium Impact	Medium Impact	High Impact	Medium Impact	23
Technology/Equipment	Operations Support	Medium Impact	Medium Impact	Medium Impact	Medium Impact	20
Admin/Maintenance Facilities	All	Medium Impact	Medium Impact	Low Impact	Medium Impact	17
Customer Facilities	Bus Stop/ Shelter Improvements	Low Impact	No Impact	High Impact	Medium Impact	15
Vehicles	Support Vehicles	Medium Impact	Medium Impact	Low Impact	Low Impact	14
Technology/Equipment	Onboard Systems—Safety	No Impact	No Impact	Medium Impact	High Impact	13
Technology/Equipment	Administrative	Low Impact	Low Impact	Low Impact	Low Impact	8

Service Impact Score (SGR & MIN)

- In order to differentiate based on specific characteristics of a project, the following “Additional Considerations” are used to adjust the default score for each criteria

Criteria	Additional Considerations <i>Added to Default Score (Not to Exceed 10 points for Any Criterion)</i>
Operating Efficiency	<ul style="list-style-type: none"> • Add 1 point for LEED-certified buildings or facilities (reduced facility operating costs). • Add 1 point for Electric or Hybrid Technology vehicles • Add 1 point for expansion buses if the agency spare ratio is below 15%
Service Frequency, Travel Time and Reliability	<ul style="list-style-type: none"> • Add 1 point if the agency fixed-route on-time performance (OTP) is greater than 80% • Add 1 point if the agency Vehicle Mean Distance between Failures > 10,000 miles
Service Accessibility and Customer Experience	<ul style="list-style-type: none"> • Add 1 point for investments that add new stops or expand service coverage • Add 1 point for software/hardware to provide real-time arrival information
Safety and Security	<ul style="list-style-type: none"> • Add 1 point for onboard technology to enhance passenger safety • Add 1 point for improved lighting or other crime prevention features • Add 1 point for pedestrian safety improvements

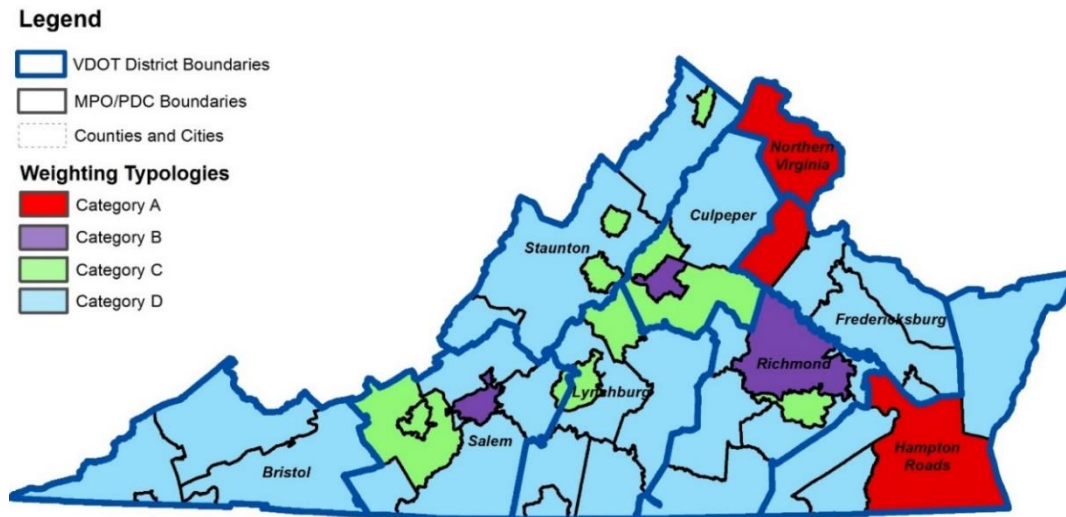
Scoring: Major Expansion (MAJ)

- **Major Expansion projects are evaluated based on metrics that address the six SMART SCALE Factor Areas:**

Factor	Measure	Measure Weight
Congestion Mitigation	Change in peak-period transit system ridership attributed to the project	100%
Economic Development	Project consistency with regional and local economic development plans and policies, and support for local development activity	100%
Accessibility	Project improvement in accessibility to jobs, workforce development, and select non-work destinations	50%
	Disadvantaged population (low-income, minority, or limited English proficiency) within walking distance of project	50%
Safety	Project contribution to improving safety and security, reducing risk of fatalities or injuries	100%
Environmental Quality	Reduction in daily vehicle miles traveled resulting from project	100%
Land Use	Transit supportive land use served by the project	100%

Scoring: Major Expansion (MAJ)

- The prioritization criteria within each of the six factor areas is weighted differently by four area type categories



Factor:	Congestion Mitigation	Economic Development	Accessibility	Safety	Environmental Quality	Land Use
Category A	45%	5%	15%	5%	10%	20%
Category B	15%	20%	25%	20%	10%	10%
Category C	15%	25%	25%	25%	10%	
Category D	10%	35%	15%	30%	10%	

Scoring: Major Expansion (MAJ)

- **Calculating Benefit Scores and MERIT Scores:**
 - » **Step 1:** Within each of the six factor areas, a raw measure is normalized against a maximum value (0-100 scale)
 - » **Step 2:** Measure weightings and area weightings are applied.
 - » **Step 3:** Weighted measures are added up to produce a “Benefit Score” which summarizes the benefits found through the measures.
 - » **Step 4:** The “Benefit Score” is divided by cost (in \$10 millions) to calculate the “MERIT Score.”

Capital Assistance – Proposed Changes



Making Efficient + Responsible Investments In Transit

1. Edit MERIT Category Definitions

- **Recommendation:** Edit the definitions of the three program categories – State of Good Repair, Minor Enhancements, and Major Expansions
- **Rationale:** It is difficult ensure that all projects are evaluated according to the guidelines as written. This has been particularly problematic for large facility replacement projects and technology projects that exceed \$2 million.
 - » The current MERIT category definitions indicate that replacement of a large facility should be scored as an SGR project, however all facility replacements include either enhancements or expansions.
 - » The current MERIT category definitions indicate that large technology projects that cost over \$2 million should be considered MAJ projects, however these projects do no provide expanded service.

1. Edit MERIT Category Definitions

- **Current Category Definitions –**

- » **State of Good Repair (SGR):**

- Refers to capital projects or programs to replace or rehabilitate an existing asset.

- » **Minor Enhancements (MIN):**

- Refers to capital projects or programs to add capacity, new technology, or customer enhancements meeting the following criteria:
 - Total cost of less than \$2 million, or
 - For expansion vehicles, an increase of less than five vehicles or less than 5% of the fleet size, whichever is greater.

- » **Major Expansion (MAJ):**

- Refers to capital projects or programs to add, expand, or improve service with:
 - Total cost exceeding \$2 million, or
 - For expansion vehicles, an increase of greater than 5 vehicles or 5% of fleet size, whichever is greater.

1. Edit MERIT Category Definitions

- **Proposed Category Definitions –**
 - » **State of Good Repair (SGR):**
 - Capital projects or programs to replace or rehabilitate an existing asset, **excluding major capital construction projects with a total cost over \$2 million.**
 - » **Minor Enhancements (MIN):**
 - Capital projects or programs **that add capacity or include the purchase of new assets meeting the following criteria:**
 - Total project cost of less than \$2 million, or
 - For expansion vehicles, an increase of less than 5 vehicles or less than 5% of the fleet size, whichever is greater, or
 - *All projects for engineering and design.*
 - » **Major Expansion (MAJ):**
 - Refers to capital projects or programs to add, expand, or improve service with:
 - Total cost exceeding \$2 million, or
 - For expansion vehicles, an increase of greater than 5 vehicles or 5% of fleet size, whichever is greater, or
 - » **Add language:** *“The DRPT Director shall determine the project category for projects that do not conform to these definitions.”*

2. Edit Local Match Requirement

- **Recommendation:** Add a provision to the CTB policy allowing for a lower local match rate for projects that receive federal discretionary funding.
 - » *“DRPT has the discretion to allow for a lower required local match for a project that has been awarded federal discretionary funding.”*
- **Rationale:**
 - » VA has historically received a very small portion of funds available through FTA discretionary programs.
 - » The IJA has substantially increased the amount of money that is available through these programs.
 - » Historically, agencies have been reluctant to apply for discretionary funding due to additional administrative burdens and the lack of incentives to do so.
 - » Lowering the DRPT defined local match requirement to implement capital projects provides a clear financial incentive to apply.
 - » Incentivizing agencies to seek discretionary funding will also substantially lower the financial burden on the state.

2. Edit Local Match Requirement

Typical Funding Match by Agency Type

Major Expansion Project - \$10 Million Bus Facility

Service Provider Type		Federal	State	Local	Total
Large Urban	Match %	46%	50%	4%	100%
	Match \$	\$4,600,000	\$5,000,000	\$400,000	\$10,000,000
	Sources:	FTA5307, FTA5339	State Capital MTF	Local/Regional Funds	-
Small Urban	Match %	46%	50%	4%	100%
	Match \$	\$4,600,000	\$5,000,000	\$400,000	\$10,000,000
	Sources:	FTA5307	State Capital MTF	Local/Regional Funds	-
Rural	Match %	80%	16%	4%	100%
	Match \$	\$8,000,000	\$1,600,000	\$400,000	\$10,000,000
	Sources:	5311, ADTAP	State Capital MTF	Local Funds	-

2. Edit Local Match Requirement

Typical Funding Match by Agency Type – With Discretionary Funding Major Expansion Project - \$10 Million Bus Facility

Service Provider Type		Federal	State	Local	Total
Large Urban	Match %	75%	23%	2%	100%
	Match \$	\$7,500,000	\$2,300,000	\$200,000	\$10,000,000
	Sources:	FTA Discretionary Program	State Capital MTF	Local/Regional Funds	-
Small Urban	Match %	75%	23%	2%	100%
	Match \$	\$7,500,000	\$2,300,000	\$200,000	\$10,000,000
	Sources:	FTA Discretionary Program	State Capital MTF	Local/Regional Funds	-
Rural	Match %	80%	18%	2%	100%
	Match \$	\$8,000,000	\$1,800,000	\$200,000	\$10,000,000
	Sources:	FTA Discretionary Program + FTA5311	State Capital MTF	Local Funds	-

3. Create a Capital Discretionary Set-Aside

- **Recommendation:** Create an annual capital set-aside allocation that can be distributed to projects seeking funding through federal discretionary grant programs throughout the fiscal year. When a discretionary opportunity arises, projects can be evaluated as part of previously approved Fiscal Year's MERIT – Capital Assistance program, and funds can be distributed from this set-aside.
- **Rationale:**
 - » For projects seeking federal discretionary program funding, DRPT cannot currently provide a guarantee of future funding for a capital project because state funding determinations are made based on the pool of applicant projects each year.
 - » In addition, the fact that federal and state funding cycles are not aligned creates additional administrative obstacles. These issues combined create obstacles to applying for additional federal funding available.

4. Update Asset Condition Scoring

- **Recommendation:** Update Asset Condition Scores to Lower the floor for earning points to 80% of ESL for all vehicle types
- **Rationale:**
 - » Replacement assets only begin to generate points in the “asset condition score” when they have reached 95% of their Estimated Service Life (ESL). This means a vehicle that has reached 10% of ESL and 94% score exactly the same.
 - » Additionally, vehicle delivery can take up to 2 years (in 2022 delivery estimates can be up to 3 years), which means that vehicles are 2-3 years past their ESL when they are finally taken out of service

4. Update Asset Condition Scoring

- **Current Asset Condition Score Schedule:**

Age of Asset Relative to Service Life	Points	Mileage of Vehicle Relative to Service Life	Points
< 95% of ESL Age	0	< 95% of ESL Mileage	0
+/- 4.9% ESL Age	30	+/- 4.9% ESL Mileage	30
5-9.9% > ESL Age	35	5-9.9% > ESL Mileage	35
10-19.9% > ESL Age	40	10-19.9% > ESL Mileage	40
20-29.9% > ESL Age	45	20-29.9% > ESL Mileage	45
30-39.9% > ESL Age	50	30-39.9% > ESL Mileage	50
40-49.9% > ESL Age	55	40-49.9% > ESL Mileage	55
50% or more > ESL Age	60	50% or more > ESL Mileage	60

4. Update Asset Condition Scoring

- Proposed Asset Condition Score Schedule:**

Age of Asset Relative to Service Life	Points	Mileage of Vehicle Relative to Service Life	Points
< 80% of ESL Age	0	< 80% of ESL Mileage	0
80-89.9% of ESL Age	20	80-89.9% of ESL Mileage	20
90-99.9% of ESL Age	25	90-99.9% of ESL Mileage	25
0-9.9% > ESL Age	30	+/- 4.9% ESL Mileage	30
5-9.9% > ESL Age	35	5-9.9% > ESL Mileage	35
10-19.9% > ESL Age	40	10-19.9% > ESL Mileage	40
20-29.9% > ESL Age	45	20-29.9% > ESL Mileage	45
30-39.9% > ESL Age	50	30-39.9% > ESL Mileage	50
40-49.9% > ESL Age	55	40-49.9% > ESL Mileage	55
50% or more > ESL Age	60	50% or more > ESL Mileage	60

4. Update Asset Condition Scoring

- Minimum Vehicle Age When Taken out of Service

Vehicle ESL Category	Min Service Life (years)	Current Policy			Proposed Policy		
		Min Age – Earn Asset Condition Points	Min Age – Taken out of Service (2 year delivery)	Min Age – Taken out of Service (3 year delivery)	Min Age – Earn Asset Condition Points	Min Age – Taken out of Service (2 year delivery)	Min Age – Taken out of Service (3 year delivery)
4 year/ 100,000mi Vehicles	4	3.8	5.8	6.8	3.2	5.2	6.2
7 year/ 200,000mi Vehicles	7	6.65	8.65	9.65	5.6	7.6	8.6
10 year/ 350,000mi Vehicles	10	9.5	11.5	12.5	8	10	11
12 year/ 500,000mi Vehicles	12	11.4	13.4	14.4	9.6	11.6	12.6

5. Update Service Impact Scoring

- **Recommendations:**

1. Update the “Service Impact Score” schedule to include more project types and provide higher default scores for certain priority project types **[up to 40 points]**
2. Replace “Additional Considerations” within Service Impact Score with a new scoring category – “Incentive Scoring” **[up to 10 points]**

- **Rationale**

- » **Project Types:**

- Currently, Service Impact Scores are based on 12 unique “MERIT - Project Type” categories that reflect standard capital projects implemented by transit service providers.
- The 12 categories do not offer enough differentiation between certain types of projects, specifically in the Minor Enhancement program

- » **Baseline Scores:**

- Some “MERIT Project Type” categories generate low scores, yet represent high priority projects for DRPT.

5. Update Service Impact Scoring

» “Additional Considerations”:

- Within the “Service Impact Score”, projects can receive up to 10 additional points based on a few select agency-wide performance metrics or specific characteristics of a project.
- However, there are multiple issues with the “Additional Considerations” in their current form:
 - The current weighting of the additional points has proven to make little difference in funding decisions
 - One additional point offers little incentive to pursue certain types of projects
 - The current additional considerations are not always in line with statewide goals
 - The agency-wide performance metrics have been difficult to verify

5. Update Service Impact Scoring

- Current Service Impact Condition Score Schedule**

High Impact: **8 pts**
 Medium Impact: **5 pts**
 Low Impact: **2 pts**
 No Impact: **0 pts**

Primary Project Types	Secondary Project Types	Operating Efficiency	Frequency, Travel Time and/or Reliability	Accessibility and/or Customer Experience	Safety and Security	Total Default Score
Vehicles	Revenue Vehicles	High Impact	High Impact	High Impact	High Impact	32
Vehicles	Overhaul/Engine Replacement	High Impact	High Impact	Medium Impact	High Impact	29
Customer Facilities	Transit Centers/Stations	Medium Impact	Medium Impact	High Impact	Medium Impact	23
Maintenance Equipment & Parts	All	Medium Impact	Medium Impact	Medium Impact	High Impact	23
System Infrastructure	All	High Impact	Medium Impact	Medium Impact	Medium Impact	23
Technology/Equipment	Onboard Systems—ITS/Communications	Medium Impact	Medium Impact	High Impact	Medium Impact	23
Technology/Equipment	Operations Support	Medium Impact	Medium Impact	Medium Impact	Medium Impact	20
Admin/Maintenance Facilities	All	Medium Impact	Medium Impact	Low Impact	Medium Impact	17
Customer Facilities	Bus Stop/ Shelter Improvements	Low Impact	No Impact	High Impact	Medium Impact	15
Vehicles	Support Vehicles	Medium Impact	Medium Impact	Low Impact	Low Impact	14
Technology/Equipment	Onboard Systems—Safety	No Impact	No Impact	Medium Impact	High Impact	13
Technology/Equipment	Administrative	Low Impact	Low Impact	Low Impact	Low Impact	8

5. Update Service Impact Scoring

High Impact: **10 pts**
 Medium Impact: **6 pts**
 Low Impact: **3 pts**
 No Impact: **0 pts**

- Proposed Service Impact Score Schedule** – by category

Primary Project Types	Secondary Project Types	Operating Efficiency	Frequency, Travel Time and/or Reliability	Accessibility and/or Customer Experience	Safety and Security	Total Default Score
Admin/Maintenance Facilities	Supports Operations*	High Impact	Medium Impact	Low Impact	Medium Impact	25
Admin/Maintenance Facilities	Non-Operational*	Low Impact	Low Impact	Low Impact	Medium Impact	15
Customer Facilities	Transit Centers/Stations	Medium Impact	Medium Impact	High Impact	Medium Impact	28
Customer Facilities	Bus Stop/ Shelter Improvements	Low Impact	Low Impact*	High Impact	High Impact*	26
Financial Tools*	All*	High Impact	High Impact	High Impact	Medium Impact	36
Maintenance Equipment & Parts	Vehicle and Vehicle Support Equipment*	High Impact	High Impact	Medium Impact	Medium Impact	32
Maintenance Equipment & Parts	Property and Facilities*	Medium Impact	Low Impact	Low Impact	High Impact	22
System Infrastructure	All	High Impact	Medium Impact	Medium Impact	Medium Impact	28
Technology/Equipment	Onboard Systems—ITS/Communications	Medium Impact	Medium Impact	High Impact	Medium Impact	28
Technology/Equipment	Operations Support	Medium Impact	Medium Impact	Medium Impact	Medium Impact	24
Technology/Equipment	Onboard Systems—Safety	No Impact	No Impact	Medium Impact	High Impact	16
Technology/Equipment	Administrative	Low Impact	Low Impact	Low Impact	Low Impact	12
Vehicles	Revenue Vehicles	High Impact	High Impact	High Impact	High Impact	40
Vehicles	Overhaul/Engine Replacement	High Impact	High Impact	Medium Impact	High Impact	36
Vehicles	Support Vehicles	Medium Impact	Medium Impact	Low Impact	Low Impact	18

* Indicates new additions and changes to default impact rating

5. Update Service Impact Scoring

- Proposed Service Impact Score Schedule – by score**

High Impact: **10 pts**
 Medium Impact: **6 pts**
 Low Impact: **3 pts**
 No Impact: **0 pts**

Primary Project Types	Secondary Project Types	Operating Efficiency	Frequency, Travel Time and/or Reliability	Accessibility and/or Customer Experience	Safety and Security	Total Default Score
Vehicles	Revenue Vehicles	High Impact	High Impact	High Impact	High Impact	40
Financial Tools*	All*	High Impact	High Impact	High Impact	Medium Impact	36
Vehicles	Overhaul/Engine Replacement	High Impact	High Impact	Medium Impact	High Impact	36
Maintenance Equipment & Parts	Vehicle and Vehicle Support Equipment*	High Impact	High Impact	Medium Impact	Medium Impact	32
Customer Facilities	Transit Centers/Stations	Medium Impact	Medium Impact	High Impact	Medium Impact	28
System Infrastructure	All	High Impact	Medium Impact	Medium Impact	Medium Impact	28
Technology/Equipment	Onboard Systems—ITS/Communications	Medium Impact	Medium Impact	High Impact	Medium Impact	28
Customer Facilities	Bus Stop/ Shelter Improvements	Low Impact	Low Impact*	High Impact	High Impact*	26
Admin/Maintenance Facilities	Supports Operations*	High Impact*	Medium Impact	Low Impact	Medium Impact	25
Technology/Equipment	Operations Support	Medium Impact	Medium Impact	Medium Impact	Medium Impact	24
Maintenance Equipment & Parts	Property and Facilities*	Medium Impact	Low Impact	Low Impact	High Impact	22
Vehicles	Support Vehicles	Medium Impact	Medium Impact	Low Impact	Low Impact	18
Technology/Equipment	Onboard Systems—Safety	No Impact	No Impact	Medium Impact	High Impact	16
Admin/Maintenance Facilities	Non-Operational*	Low Impact	Low Impact	Low Impact	Medium Impact	15
Technology/Equipment	Administrative	Low Impact	Low Impact	Low Impact	Low Impact	12

* Indicates new additions and changes to default impact rating

5. Update Service Impact Scoring

- **Current Service Impact Score “Additional Considerations” Schedule**

Criteria	Additional Considerations Added to Default Score (Not to Exceed 10 points for Any Criterion)
Operating Efficiency	<ul style="list-style-type: none">• Add 1 point for LEED-certified buildings or facilities (reduced facility operating costs).• Add 1 point for Electric or Hybrid Technology vehicles• Add 1 point for expansion buses if the agency spare ratio is below 15%
Service Frequency, Travel Time and Reliability	<ul style="list-style-type: none">• Add 1 point if the agency fixed-route on-time performance (OTP) is greater than 80%• Add 1 point if the agency Vehicle Mean Distance between Failures > 10,000 miles
Service Accessibility and Customer Experience	<ul style="list-style-type: none">• Add 1 point for investments that add new stops or expand service coverage• Add 1 point for software/hardware to provide real-time arrival information
Safety and Security	<ul style="list-style-type: none">• Add 1 point for onboard technology to enhance passenger safety• Add 1 point for improved lighting or other crime prevention features• Add 1 point for pedestrian safety improvements

5. Update Service Impact Scoring

- Proposed Incentive Scoring Schedule**

Criteria	Points	DRPT Incentive Points: SGR and MIN Projects
		<i>Incentives for projects that satisfy DRPT Goals (Not to exceed 10 points total per project)</i>
Zero - Emissions Technology	5 Points , if project includes one of the following:	<ul style="list-style-type: none"> · Procurement of Zero-Emissions Vehicles, or · Installation of Zero-Emissions Infrastructure
Innovation	5 Points , if project includes one of the following:	<ul style="list-style-type: none"> · Installation of Real-Time Departure/ Arrival Information, or · Automated Data Collection, Scheduling and Dispatch technology acquisition, or · Utilization of Transit Signal Priority, or · Installation of safety technology, or · Mobile Ticketing
Safety and Comfort Around Customer Facilities	5 Points , if project includes one of the following:	<ul style="list-style-type: none"> · Enhanced Lighting at Transit Stations or Stops, or · Enhancements for Pedestrians/ Accessibility connecting passengers to Transit, or · Projects that include benches or shelters
Agency Accountability	5 point , if all requirements are met:	<ul style="list-style-type: none"> · Compliance with State Asset Management Requirements (TransAM Updates) · Compliance with State Strategic Planning Requirements (TSP/TDP Update Letters) · Compliance with State Capital Planning Requirements (5-year Capital Budgets) · Compliance with State Performance Reporting (On-time reporting in OLGA)

6. Update MAJ Accessibility Metrics

- **Recommendation:** Update the descriptions of the MAJ Accessibility measures to address methodological considerations, and provide greater flexibility.
- **Rationale:**
 - » **“Non-Work” Destinations:**
 - Non-work destinations capture locations that are not directly associated with “access to jobs” such as workforce development, healthcare, public services, and parks. However, the non-work data source we have used is limited and is not regularly updated.
 - Almost all projects max out the 3 additional points associated with these non-work areas in the scoring methodology.
 - » **Disadvantaged Populations:**
 - CTB policy currently narrowly defines “Disadvantaged Populations” in the methodology as Low-Income, Minority, and Limited English Proficiency.
 - These three groups do not fully capture all “transit dependent” population groups (i.e. 0-car households, persons with disabilities, seniors).

6. Update MAJ Accessibility Metrics

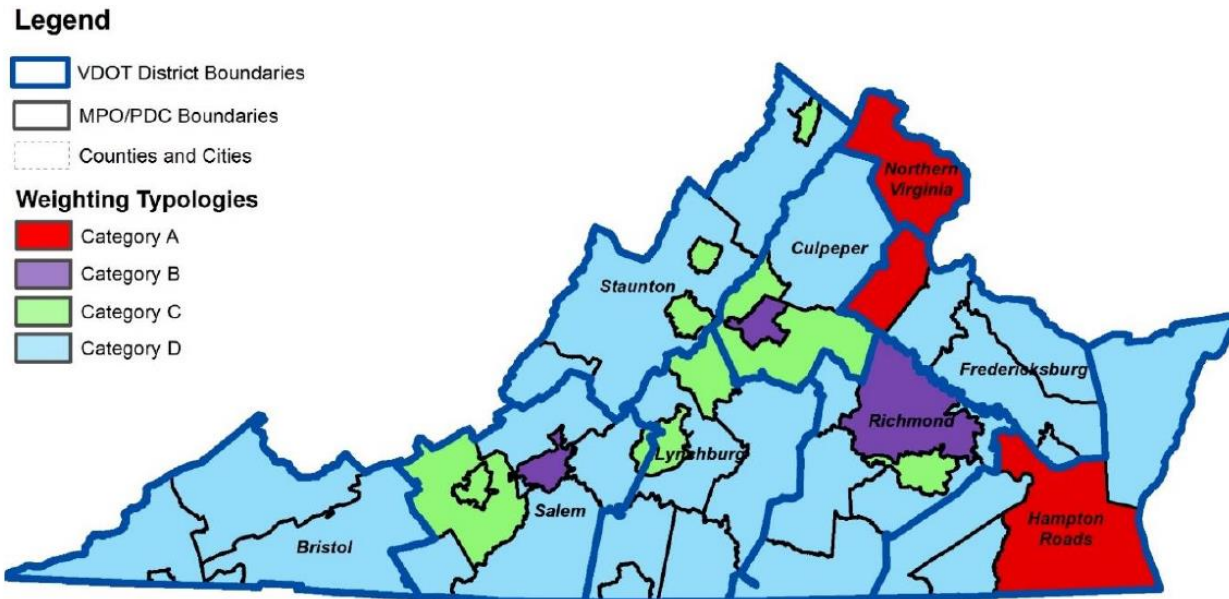
- Recommended Text Changes:**

Factor	Measure	Measure Weight
Congestion Mitigation	Change in peak-period transit ridership attributed to the project	100%
Economic Development	Project consistency with regional and local economic development plans and policies, and support for local development activity	100%
Accessibility	Project improvement in accessibility to jobs, workforce development, and select non-work destinations	50%
	Disadvantaged population (low-income, minority, or limited English proficiency) within walking distance of project	50%
Safety	Project contribution to improving safety and security, reducing risk of fatalities or injuries	100%
Environmental Quality	Reduction in daily vehicle miles traveled resulting from project	100%
Land Use	Transit supportive land use served by the project	100%

7. Remove MAJ Area Based Weights

- **Recommendation:** Remove the SMART SCALE area based factor weights from the Major Expansion scoring methodology. Instead, all factors will be equally weighed regardless of the geographic location of the project.
- **Rationale:**
 - » SMART SCALE geographic weighting is an effective way to even the playing field between hundreds of projects in different areas across the state each cycle within the SMART SCALE Program.
 - » The MERIT - Major Expansion category provides funding to a much smaller, more targeted pool of transit projects [Max. 4 projects evaluated annually FY20-23]
 - » Staff and consultants have performed extensive testing to explore the impact of area weights on scoring, and found the impacts to be negligible

7. Remove MAJ Area Based Weights



Factor	Congestion Mitigation	Economic Development	Accessibility	Safety	Environmental Quality	Land Use
Category A	45%	5%	15%	5%	10%	20%
Category B	15%	20%	25%	20%	10%	10%
Category C	15%	25%	25%	25%	10%	
Category D	10%	35%	15%	30%	10%	

Capital Assistance - Open Discussion



Making Efficient + Responsible Investments In Transit