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April 29, 2016

CALL FOR PROJECTS
Bike Share Capital Program

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Alix Bockelman
Deputy Executive Director, Policy

Andrew B. Fremier
Deputy Executive Director, Operations

The Metropolitan Transportation Commission (MTC) invites your public agency to submit a Letter of Interest for Phase 1 of the Bike Share Capital Program, which is intended to launch or expand bike share programs throughout the region. Documents for this Call for Projects are available on the MTC website at <http://www.mtc.ca.gov/our-work/plans-projects/bicycle-pedestrian-planning>.

Interested agencies must submit one electronic PDF version of their letter (three page maximum) by 4:00 p.m. on Friday, June 17, 2016. After reviewing submitted letters, staff will present the results to MTC Commissioners for consideration at a Committee meeting, and following Commissioner feedback, a number of agencies may be asked to submit full proposals. Other key dates and details are included in the full program description.

The goal of the Bike Share Capital Program is to expand bicycle access and use through bike sharing and to facilitate multimodal transportation in connection with transit. Up to \$2 million in funding is available in Phase 1, which is a one-time funding source intended to help project sponsors with capital purchase and initial implementation costs. Ongoing bike share operations are not eligible.

Please submit your Letter of Interest to Kevin Mulder, Project Manager, at kmulder@mtc.ca.gov, or call (510) 817-5764 with any questions.

Thank you for your interest.

Sincerely,

Alix A. Bockelman
Deputy Executive Director, Policy

Bike Share Capital Program Phase 1 Application

AB:KM

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Bike Share Capital Program

Phase 1

MTC is now accepting Letters of Interest from public agencies to launch or expand bike share programs throughout the region. The **Bike Share Capital Program** and the application process are described below and online at <http://www.mtc.ca.gov/our-work/plans-projects/bicycle-pedestrian-planning>. Letters are due by 4:00 p.m., Friday, June 17, 2016.

Background/Goals & Objectives

Bike sharing has been a mixed success in the Bay Area, as demonstrated by the Bay Area Air Quality Management District’s pilot bike share program, Bay Area Bike Share (BABS). The program launched in 2013 and reached 800,000 trips in early 2016, ranging from 0.12 to 2.7 trips per bike per day in the participating cities (San Francisco, San Jose, Mountain View, Redwood City and Palo Alto). In May 2015, MTC’s Commission approved a privately-funded BABS expansion in Berkeley, Emeryville, Oakland, San Francisco, and San Jose by Motivate Inc. that will add over 6,000 bikes to the system at no cost to those cities or the region.

MTC’s Commission also set aside \$4.5 million for the Bike Share Capital Program in the remaining Bay Area communities at the same May 2015 meeting. The Bike Share Capital Program will award grants over two phases, with the timing of the second phase to be determined following Phase 1.

The Bike Share Capital Program funding is a one-time funding source to help project sponsors with capital purchase and initial implementation costs and will not be an on-going grant program. It will also not fund operations due to constraints on the federal Congestion Mitigation and Air Quality (CMAQ) funds committed to the program. The goal of the program is to expand bicycle access and bicycle use and to facilitate multimodal transportation in connection with transit.

Program Summary

Eligible projects	Bike share capital projects in Bay Area communities other than Berkeley, Emeryville, Oakland, San Francisco, and San Jose
Total amount available	Up to \$2 million in Phase 1
Type of funds	Congestion Mitigation and Air Quality Funds (CMAQ) – Federal Funds administered by Caltrans Local Assistance
Grant minimum	\$500,000
Grant maximum	\$1,250,000
Required local match	11.47% of total project cost

Eligible Projects

Eligibility is limited to capital expenses related to launching or expanding a bike share program. The grant and match can pay for direct project costs, including staff and project management; however, planning studies are ineligible due to CMAQ fund source limitations. Both smart dock- and smart bike-based systems are eligible; typical components will include, but may not be limited to:

- Bicycles
- Station components
 - Kiosks, docks/racks, & platforms/bases
 - Solar kits & batteries
 - Map modules
 - Cables, plugs, & tools
- Testing equipment
- Purchase of support/rebalancing vehicles for bicycles
- Membership cards & readers
- Planning, engineering, design, & permitting
- Site prep & installation
- Project management
- Web/software & testing
- Component shipping

Eligible Applicants

Public agencies (with agreements in place to receive federal-aid funding) are eligible applicants. While all public agencies are eligible to apply, projects located in Priority Development Areas (PDAs) will receive priority (see <http://mtc.ca.gov/our-work/plans-projects/focused-growth-livable-communities/priority-development-areas> for more information).

Interested businesses, non-profit 501(c)(3) organizations, and community organizations may also apply if they partner with a public agency that will sponsor the project. In such cases, if a grant is awarded, the public agency will be the grant recipient and can subcontract with the business / organization to implement the project. The public agency is responsible for carrying out all requirements and obligations associated with the use of federal funds. The public agency is also accountable for implementing and delivering the project. Successful grant recipients will work with Caltrans to meet federal-aid requirements in order to receive federal funds for the project.

Grant Funding

The fund source for these competitive grants is federal CMAQ funds, and projects must follow federal procurement rules, including a competitive bid process. A local, non-federal match of 11.47 percent of the total project budget is required by these federal funds and must be provided as a match. In addition, all projects must meet CMAQ eligibility and requirements. Following grant awards, project sponsors must apply to Caltrans Local Assistance and comply with federal-aid requirements before incurring any project costs eligible for reimbursement. More information on CMAQ requirements can be found here:

- http://www.fhwa.dot.gov/environment/air_quality/cmaq/policy_and_guidance/2013_guidance/index.cfm

Local assistance procedures can be found at the Caltrans website:

- <http://www.dot.ca.gov/hq/LocalPrograms/index.html>

Project sponsors must also meet all requirements of the MTC Regional Project Delivery Policy:

- <http://mtc.ca.gov/our-work/fund-invest/federal-funding/project-delivery> (also see Appendix A).

Project sponsors are responsible for compliance with the requirements of California Environmental Quality Act (CEQA) and National Environmental Policy Act (NEPA).

The 11.47 percent required local match is based on total project cost, not the amount of the grant. For example: an agency with a \$600,000 project could apply for \$531,180 in grant funding (88.53% of \$600,000) with a \$68,820 local match (11.47% of \$600,000).

Application Process

The Bike Share Capital Program will follow a two-step application and evaluation process that will be overseen by an evaluation committee of staff from MTC and other evaluators as appropriate.

Step One: All interested applicants must submit a Letter of Interest, including the following components (3-page limit):

- **Applicant Information:** Identify the project title, name of applicant, project manager, contact information, and any project partners.
- **Project Description:** Describe the proposed project, including project type (e.g. “smart bike” vs. “smart dock” system), purpose, and need of the project (please also attach a map of the project area, service area, and/or photos — these attachments will not count towards the page limit).
- **Project Impacts:** Explain how the project will measurably increase bicycling in the community, address first/last mile needs, and reduce GHG and particulate matter (PM) emissions.
- **Project Readiness:** Describe project readiness, including any supporting studies, complementary TDM efforts, and/or other related activities and strategies.
- **Local Support:** Identify local support for the proposed project thus far, and include a letter of support from the City Manager’s office and/or transit agency general manager (will not count towards the page limit).
- **Funding:** Identify a total budget for the project, the amount of grant funding requested, and local match. If membership, usage, or advertising/sponsorship revenue is expected to be generated from the project, address how the funds will be used. Appendix B and the project website include a budget template to assist with budget development (it is not required to submit the line item budget with the letter, but if submitted, it will not count towards the limit).
- **Data Collection and Evaluation:** Identify planned data collection efforts, outcomes that signify success, and how the project will be evaluated to measure performance.

The evaluation committee will review all Letters of Interest and contact applicants, as needed, for additional information, clarification, and/or modification. Staff will then present the results of Step One to an MTC Committee in July or September for further review before conducting **Step Two**.

Step Two: The evaluation committee will identify a small number of promising projects and invite these applicants to submit a more formal proposal for further evaluation. The formal proposal will include and expand upon the components listed in **Step One** and will also require a detailed implementation and full funding plan. Applicants are encouraged to develop funding options for ongoing operations and maintenance early in the application process. Potential sources may include, but are not limited to:

- Local sponsorship
- County transportation sales tax or vehicle license fees
- Fuel tax
- Transportation Development Act Article 3 (TDA-3)
- Active Transportation Program (ATP)
 - Note: ATP is not expected to be available in the near-term given programming cycles
- Bicycle Transportation Account (BTA)
- Transportation Management Areas (TMAs)
- Other local funding
- One Bay Area Grant program (OBAG 2) – currently only available for capital

The evaluation committee will quantitatively evaluate proposals against the following criteria:

- Potential for impact (including bicycle mode shift, reduced VMT, first/last mile solutions, etc.)
- Full funding plan for ongoing operations
- Readiness and local support (including feasibility studies, bike facilities, complete streets policies, other engagement, etc.)
- Local match share of total project cost
- Capability of the project partners to implement the project
- Location within a Priority Development Area (PDA), Community of Concern (COC), or Community Air Risk Evaluation (CARE) Program area

All Letters of Interest and Proposals (if invited to submit a proposal) must be submitted electronically to the MTC Project Manager as follows:

Kevin Mulder, Project Manager
 RE: Application for Bike Share Capital Program
kmulder@mtc.ca.gov

Schedule & Timeline

MTC issues call for projects	Friday, April 29, 2016
Pre-Application Workshops	Thursday, May 12, 2016, from 2:00 – 4:00 pm Joseph P. Bort MetroCenter, Oakland
Please RSVP to Kevin Mulder: kmulder@mtc.ca.gov or (510) 817-5764	Friday, May 13, 2016 from 1:00 – 3:00 pm SamTrans, 1250 San Carlos Avenue, San Carlos
	Monday, May 16, 2016 from 2:30 – 4:30 pm Napa Valley Transportation Authority, 625 Burnell Street, Napa

Deadline for Letters of Interest to MTC	Friday, June 17, 2016 at 4:00 pm
MTC Programming & Allocations Committee reviews results of Step One and considers full application process (<i>tentative</i>)	Wednesday, July 13, 2016
Select applicants are invited to submit detailed proposals (<i>tentative</i>)	Friday, July 22, 2016
Deadline for selected applicants to submit proposals to MTC for further evaluation (<i>tentative</i>)	Friday, October 7, 2016 by 4:00 pm
Review Process	October – November 2016
Recommended Program of Projects (<i>tentative</i>)	December 14, 2016 (MTC's Programming and Allocations Committee)
Commission Approval (<i>tentative</i>)	December 21, 2016
TIP Revision Approval (<i>tentative</i>)	January 2017
Request for Obligation / E-76 from Caltrans (<i>tentative</i>)	June 2017 – MTC strongly advises obligating funds within six months of receiving Commission/TIP approval
E-76 Approval from Caltrans (<i>tentative</i>)	July 2017
Project Implementation	By December 2018, or within 24 months of receiving MTC Commission approval. <ul style="list-style-type: none"> Funds must be obligated by January 2018

MTC Contact

For questions about grant application requirements or to discuss potential project ideas in advance of submitting an application, please contact **Kevin Mulder**, Project Manager, at (510) 817-5764 or at kmulder@mtc.ca.gov.

Appendix A
Delivery Requirements

Project sponsor understands and agrees to comply with timeframe deadlines indicated in MTC's Regional Project Delivery Policy, MTC Resolution #3606. The full resolution policy is in the attached link: <http://mtc.ca.gov/our-work/fund-invest/federal-funding/project-delivery>

In addition, project sponsor agrees to the following:

- a. Project Manager/Engineer should have previous project experience with the Federal Aid Process administered by Caltrans Local Assistance, District 4. If such qualified personnel are not on staff, project sponsor should to hire a consultant with such experience or commit to attend Federal Aid Process training class sponsored by Caltrans.
- b. Federal funds through the Bike Share Capital Program are fixed at the programmed amount, and therefore any cost escalation will not be funded through the Bike Share Capital Program.
- c. Project Managers shall participate in monthly calls with other successful applicants and MTC to ensure project delivery goals are on track and met.
- d. The "before" and "after" photos of the project will be sent to MTC for use in publications, press releases, reports, etc. about the Bike Share Capital Program.
- e. MTC will be notified immediately to discuss potential project implications that will affect the delivery of the project.

The project sponsor commits to maintaining the project.

Appendix B
Bike Share Capital Program Budget Template

Capital Expenses		Proposed Units	Estimated cost per Unit	Total Cost
Planning & Engineering				
Preliminary Engineering				\$ -
Construction Engineering				\$ -
Other				\$ -
Line Item Capital				
Bikes		-	\$ -	\$ -
Terminals/stations/kiosks		-	\$ -	\$ -
Station components		-	\$ -	\$ -
Docks		-	\$ -	\$ -
Map/information panels		-	\$ -	\$ -
Keys		-	\$ -	\$ -
Tools/supplies		-	\$ -	\$ -
Replacement/spare parts		-	\$ -	\$ -
Office/workroom/storage		-	\$ -	\$ -
Web Site		-	\$ -	\$ -
Communication / IT		-	\$ -	\$ -
Installation (per station)		-	\$ -	\$ -
Rebalancing vehicle(s)		-	\$ -	\$ -
Other		-	\$ -	\$ -
Total Capital Expenses				\$ -

See project website (<http://www.mtc.ca.gov/our-work/plans-projects/bicycle-pedestrian-planning>) for a downloadable spreadsheet of the budget templates.

Operating Expenses & Funding	Proposed Units	Estimated cost per Unit	Total Cost
Fixed Schedule Costs			
Per bike fee	-	\$ -	\$ -
Per dock fee	-	\$ -	\$ -
Per terminal/kiosk fee	-	\$ -	\$ -
Software license			\$ -
Other			\$ -
Line Item Operating			
Technical support			\$ -
Management & administration			\$ -
Field labor			\$ -
Accounting, marketing & legal			\$ -
Software license/support			\$ -
Vehicle fuel & maintenance	-	\$ -	\$ -
Wireless/connectivity	-	\$ -	\$ -
Insurance (combined)			\$ -
Customer call center			\$ -
Other			\$ -
Total Annual Operating Expenses			\$ -
Operating Funding Commitments			
Sponsorship/advertising			\$ -
Membership revenue			\$ -
Local support			\$ -
Other			\$ -
Total Annual Operating Funding			\$ -

See project website (<http://www.mtc.ca.gov/our-work/plans-projects/bicycle-pedestrian-planning>) for a downloadable spreadsheet of the budget templates.