

2021 ENHANCED MOBILITY PROGRAM

Online Grant Application: Registration Instructions and Resources

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Alternative formats of this publication are available upon request.
Please contact Sergio Ritacco at sritacco@mwkog.org or (202) 962-3232 or (202)-962-3213 (TDD).
Please allow seven working days for preparation of the material.

Registration Process Overview

The National Capital Region Transportation Planning Board application process for Federal Transit Administration (FTA) Enhanced Mobility grants is through an online grants management system, Foundant. These instructions are intended to guide the applicant through the process for registering in the Foundant system and applying for the Enhanced Mobility Program. Access the application and instructions via www.mwcog.org/enhancedmobility or visit the Foundant page directly at www.grantinterface.com/Process/Apply?urlkey=mwcog.

Unlike previous solicitations there will be a single application to use for project proposals, including those with vehicle acquisition or all other project proposals (such as travel training, mobility management or coordinated planning).

Applications are to be submitted using the on-line grants management system and are due on September 1, 2021 by 3:00 P.M. **Applications sent or delivered in other formats, after the deadline, and without the required documents using the templates provided will not be considered.**

Alternative formats of the application and this document are available upon request. Please contact Sergio Ritacco at (202) 962-3232 or sritacco@mwcog.org. Please allow five working days for preparation of the material. If accommodations for people with disabilities are needed for the pre-application conferences, please also contact Sergio Ritacco.

For questions about solicitation and eligibility, please contact Lynn Winchell-Mendy at lmendy@mwcog.org or 202.962.3253.

Registration Process

SITE ACCESS AND ACCOUNT CREATION ([VIDEO TUTORIAL](#))

drive.google.com/file/d/102-rkkxy9iQ1WLx2LKaBYr9LgFoXfaqt/view?usp=sharing

You will access the system via the log on page (www.grantinterface.com/Process/Apply?urlkey=mwocg). It's recommended that you bookmark this page in your internet browser for ease of access. If you've already created an account, you may enter your email and password and log right in. Otherwise, you'll want to click on the Create New Account button. If at any time after creating an account, you can't remember your password, you may click on the Forgot Your Password button, enter your email address, and you will be sent a link to reset your password.



Logon Page

A screenshot of the logon page. On the left, there are two input fields: 'Email Address*' and 'Password*'. Below these are three buttons: 'Log On' (blue), 'Create New Account' (white with a grey border), and 'Forgot your Password?' (blue text). Two yellow arrows point to the 'Create New Account' and 'Forgot your Password?' buttons. On the right, there is a grey box containing a welcome message and instructions for new and existing users, along with a 'Not Sure?' section.

Email Address*

Password*

[Log On](#) [Create New Account](#) [Forgot your Password?](#)

Welcome to the Foundation's online grant portal.

New Users: Please click on "Create New Account" to complete the registration process and create your logon credentials.

Existing Users: Please enter your credentials and log in. If you forgot your password, please use the "Forgot your Password" link to the left to reset your password.

Not Sure? If you think that you have already registered in the system, do not create a new account. Please contact our Administrator, at example@email.com to receive your username and password.

Create New Account:

- Creating a new account is a multi-step process;
 - with the first section collecting **Organization Information**;
 - the second section collecting **User Information**;
 - and sections three and four collecting **Executive Officer** information.
- After Organization Information has been entered click on the “**Next**” button.
- The next section is the “**User Information**” section, or YOUR information.
 - If your address is the same as your organization's, you may use the “**Copy Address from Organization**” button to automatically pull the address information from the organization address fields into the address fields in this section.
 - It is very important to note that the email address entered in the **Email/Username** field becomes the Applicant's **Username** in the system.
- Once the fields on the “**User Information**” section are completed, click on the “**Next**” button.

- Please note that should you need to navigate to previous section in the registration process, you must use the “**Previous**” button at the bottom of each section in order for the information entered in registration fields to remain intact. If you attempt to navigate to the previous section by using their browser's “back” button you will lose all registration information entered.
- In the next section you indicate if you are the Organization’s Executive Officer.
 - If you are the executive officer, select “**Yes.**” You are taken to a section of optional fields that includes only the fields that were not required in the “**User Information**” section.
 - If you are not the executive officer, select “**No,**” and complete the required Executive Officer fields.
- Once the executive officer’s information is entered, click on the “**Next**” button to create a password.
- Password requirements are listed at the top of the section, so the applicant can create their password accordingly.
- Once the password is created, the applicant clicks the “**Create Account**” button.

Password

Passwords must be at least six characters long and may contain capital or lowercase letters, numbers, or any of the following special characters: !@#\$%&*()_

Password* Confirm Password*

Email Confirmation:

Upon clicking Create Account you will be taken to the Email Confirmation page, so you can confirm that you are receiving emails from the system. Follow the onscreen instructions and click the “Continue” button to finish the registration process. Now you have an account in this system, and remember, this is an account that you will use for both present and future applications.

APPLYING FOR FUNDING ([VIDEO TUTORIAL](#))

drive.google.com/file/d/1cmTa7Hmacg4pqJpn5Xo92vp3RzRxfoeS/view?usp=sharing

Upon completing registration and accessing the system for the first time, you will land on the **Apply Page**. This page will show you any currently open opportunities that you can apply for, as well as any relevant deadlines and other applicable information related to them.

- If you've been provided an access code, you may enter it in the upper right-hand corner to reveal the opportunity you have been invited to apply to.
- You can preview the application without having to save any work by clicking on the "Preview" button.
- To start a request, click on the blue "**Apply**" button under the opportunity you'd like to apply to.
 - Clicking Apply will take you into a form to complete and submit. Depending on the Foundation the form will likely be an LOI or Application. In this example, you are taken directly into the application.

Apply

Enter Access Code Enter Code

If you have been provided with an Access Code, you may enter it in the box at the top of the page.

Quick Search

Base Camp Example Process Accepting Submissions from 01/01/2018 to 12/31/2018 Apply

This is where the process description would appear.

Preview Send to GrantHub

Once in the form, note that your contact and organization information automatically populate at the top of the form.

- You may update your contact information and view your email history.
 - If the Foundation allows applicants to update organization information you will see the edit icon next to the Organization Information.
 - If not, you must contact the Foundation directly to change organization information.
- If you'd like a PDF copy of the application, you can click the Question List button.
- Once you've completed the form, you may click the Application Packet button to download a copy of the questions and your responses.
- Please note that if the form has a specific deadline it will be listed at the top of the form.

- Depending on the Foundation you may or may not be able to submit after the deadline has passed.
 - If the past due message is reflected in orange, you may still submit the form.
 - If the past due message is reflected in red, you no longer have the option to submit the form.
 - If you are not allowed to submit, you will receive a message should you attempt to submit.

Work your way through the form responding to the fields.

- Note that any fields with an asterisk are required fields and must be completed prior to submitting an application.
- As you complete the form, the system will auto-save every 100 characters typed or every time you click out of a field.
- You may collapse question groups as you go, once you've finished all the questions in that group, as an indicator to yourself that you've completed that section and reduce scrolling.
- Some fields have character limits.
 - Responses that are longer than the set limit will be saved, but an error message will appear informing the applicant the limit has been exceeded.
 - You will not be allowed to submit the form until the length of the response has been decreased in accordance with the limit.
- File **upload fields** will only accept one file, per field.
 - Upload fields have size limits.
 - If you attempt to upload a file that is larger than the set MiB limit, you will receive an error message informing the applicant that the file is too large and the file **will not** be saved.
 - Upload fields may also have File Type restrictions.
 - If you attempt to upload a file type in an unaccepted file type acceptable file type you will receive a warning that the file type is not acceptable and you will not be able to upload the file.
 - Once a file has been uploaded, it may be **deleted** by clicking the **red X** next to the file name and a new file can be uploaded.
- Even though the system is auto-saving there is still a **"Save"** button at the bottom of the form.
 - When you click save you are taken to a confirmation page so you know the save was successful.
 - If you click **"Continue"** you will be taken back into the form so you can continue working.

- If you save and exit the system, you will access the **draft of the form** from your **Dashboard** the next time you log in.
 - Pick back up where you left off by clicking “**Edit**” link to the right of the request.
- You may abandon the request if it is the first form to be submitted for this request.
 - Once the first form, either an LOI or Application, has been submitted you must contact an administrator to withdraw the request from consideration.
 - After selecting Abandon Requests, you must type in Abandon Request and select OK
 - The request will then be visible in the Historical Requests tab just as it would if an administrator had abandoned the request.

When all of the fields are complete, submit the application.

- If any required fields were not completed, or a response to a text question type is longer than the set limit, the system will not allow the form to be submitted.
 - An error message appears listing the fields that need to be completed or edited.
 - These fields are outlined in red so they are easy to identify as the applicant scrolls through the form.
- When a form is submitted successfully, the applicant will be taken to a confirmation page.
 - When the you click “**Continue**” you are taken to your dashboard where you can VIEW your submitted request.

Note, that once an application has been submitted you can no longer edit it.

APPLICANT DASHBOARD (VIDEO TUTORIAL)


drive.google.com/file/d/155ta4kdwfWbiSnftjux_PGJHfMkse5Bz/view?usp=sharing

Your dashboard houses current and historical requests.

The active request tab houses all current requests. These are the requests still requiring action, awaiting a decision and/or requests that have not yet been marked closed by the site administrator. Within each request you can see forms, form statuses and submission dates and, if applicable, form deadlines.

∨ Fall Grant For Book Funding

Process: Base Camp Example Process

Application	Draft	07/24/2018	 Edit Application
Decision	Undecided		

- You may continue working on saved forms by clicking the edit option next to the form.
- You may view forms that have been submitted but note that once submitted you cannot edit them.
- You can also see the request's decision status.
 - The status will be "Undecided" until the site administrator posts a decision.
 - Timing on decision status updates vary depending on the foundation.

If your request is approved, you may be assigned Follow Up Reports to be completed and submitted through the system.

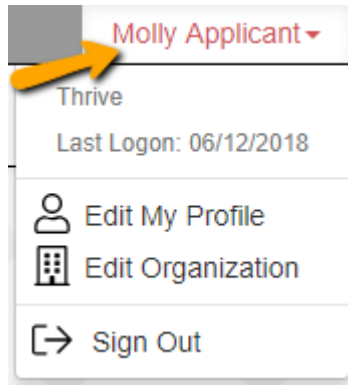
- Follow ups are completed and submitted just like any other form.
- If you've been assigned multiple follow up forms, you must complete them sequentially by due date.
- Follow ups that are past due will be marked as such.
 - If the past due message is reflected in orange, you may still submit the form.
 - If the past due message is reflected in red, you no longer have the option to submit the form.

Follow Up Forms

FORM NAME	ASSIGNED TO	AWARD / INSTALLMENT	DUE DATE	STATUS	EDIT/VIEW
Award Agreement	Molly Applicant	Overall Award	05/31/2018 Past Due	Assigned	Edit

Denied requests and requests marked closed by the site administrator are housed in the Historical Request tab.

If you wish to edit your account information or change your password, click your name in the top right. This will expand a drop-down menu. If you click Edit my profile, you will be able to update your user information or change your password. Be sure to click save in the bottom right once you've finished.



Please note, that you will be automatically logged out of the system after 90 minutes of inactivity (you will receive a warning message at 80 minutes of the pending "time out").

APPLICATION RESOURCES

2021 Enhanced Mobility Program

SECTION 6: PRIORITY PROJECTS

The purpose of the priority projects is to signal to potential applicants the kinds of projects that are most needed in the region. Agencies may also apply for other project types not listed as priority projects. As outlined in the TPB's Selection Criteria for Enhanced Mobility, proposals addressing Priority Projects can score up to twelve additional points out of a maximum of one-hundred.

A. Mobility Management

Mobility Management at the Systems Level means a full or part-time staff position within a county or city government, such as a county's transportation or human service agency, that serves in several capacities - policy coordinator, broker to help identify the best services for individual trip needs, and researcher of gaps in service. A Mobility Manager helps coordinate services in the jurisdiction and across jurisdictional lines and adapts the service to local need, serves as an information resource, for example, sharing information with agencies about project best practices, and connects agencies with travel trainers.

Mobility Management at the Individual Level is one-to-one assistance to customers in identifying their mobility needs and preferences, understanding the available options in their community that fit, providing assistance with applications for programs, or planning and reserving a trip from start to finish, as requested.

Good Examples:

- ✓ Jewish Council for the Aging's Connect-a-Ride (funded by Montgomery County DPWT).
- ✓ Montgomery County Maryland Department of Health & Human Services.
- ✓ Fairfax County Neighborhood & Community Services' Northern Virginia Mobility Access Program (NVMAP).
- ✓ Resource: The National Center for Mobility Management (NCMM) has toolkits and position descriptions for mobility managers, among other resources.

B. Coordinated Planning Efforts

This priority project emphasizes the importance of coordination at the local level by providing grant funds to jump start coordination efforts by funding the planning process. Grant funds could be utilized to make the planning process more inclusive, encourage non-traditional but interested parties to take a seat at the table, develop a local coordinated plan to share vehicles, or develop a mobility management plan for a County or region.

Good Examples:

- ✓ Prince William County, Virginia's "Transportation Options Group", a coalition of private non-profit and public human service agencies, transportation providers, and government officials who developed and implemented a Mobility Management Plan.
- ✓ Resource: Administration for Community Living (ACL) Strengthening Inclusive Coordinated Transportation Partnerships to Promote Community Living projects.

C. Travel Training

Travel Training teaches people with disabilities or older adults how to access and use transportation services, including fixed-route services. There are different types of travel training services. Some include general orientation and others are tailored to the needs of the individual. Training can be provided in groups, one-on-one, and peer-to-peer. Travel training should instruct individuals on trip planning, payment systems, the use of mobile applications (“apps”), or alternatives to apps for people without access to Smartphones. Orientation and Mobility (O&M) training is specific to people with visual impairments and teaches safe and effective travel skills. O&M training is needed throughout the region, so people can receive training closer to where they live. Many people can benefit from travel training, including older adults, people with physical, intellectual, and sensory disabilities, people unable to afford their own vehicle, and people with limited English proficiency.

Good Examples:

- ✓ Washington Metropolitan Area Transit Authority (WMATA)’s MetroReady Travel Training and System Orientation.
- ✓ The Arc of Northern Virginia’s Train the Travel Trainer program.
- ✓ Columbia Lighthouse for the Blind’s Orientation & Mobility Training.
- ✓ Resource: The Association of Travel Instruction (ATI) has a published definition of Travel Training and other resources.

D. Door-through-Door or Escorted Transportation Service

Escorted transportation services, also known as door-through-door or assisted transportation, provides a means of extra safety and assistance to a rider who needs support to travel. The level of assistance a program provides varies but does not include heavy assistance such as lifting or handling medical needs or equipment. Examples might include preparing a rider for a trip by helping with a coat or gathering documents, accompanying someone into a medical building, and staying with them throughout their appointment, or helping an individual get into and out of a vehicle.

Good Examples:

- ✓ Arlington and Alexandria Area Agencies on Aging.
- ✓ DC Office on Aging’s CREST program.

E. Increase Access to Transit Stations (and First Mile/Last Mile Connections)

Increasing walk, and bike access to transit stations is one of the seven transportation initiatives endorsed by the TPB. This priority project category includes this initiative as important way to make first mile/last mile connections from bus and rail stations and adds motorized options as well. Improvements near transit stations that provide connections to hospitals, libraries, government buildings and voting sites have the greatest priority. Three types of projects are included here:

Improving pedestrian infrastructure around transit stations to eliminate barriers to the use of public transit; including making bus stops more accessible. Bus stops need proper boarding and alighting surfaces, spaces for a wheelchair under a shelter, accessible signage, proper snow removal, and removal of newspaper boxes or other items that block pathways.

Promote adaptive cycling for people with disabilities by increasing the number of accessible bikes in bikeshare programs (e.g. hand bikes, side-by-side bikes, electric bikes and tricycles; and ensuring that these bikes are reserved for people with disabilities).

Offering taxi, ride-hailing and shuttle services to transit stations. If walking or biking is not an option to make a first mile/last mile connection to a Metrorail station due to disability, weather, or time of day– taxis, ride-railing and shuttle services can provide an important link to increase access to public transit.

Good Examples:

- ✓ Montgomery County’s Bus Stop Accessibility efforts
- ✓ Bike share programs with adaptive bikes: College Park, MD; Portland and Corvallis, OR; Carmel, IN

F. Increase Wheelchair-Accessible Options in Taxi and Ride-Hailing Services

People who use wheelchairs or mobility devices need vehicles with ramps or lifts in order to use taxis, ride-hailing services or microtransit. Wait times can be longer for people who use mobility devices, and in some cases, there is no wheelchair-accessible service available at all. A priority is to make sure wheelchair-accessible taxis, ride-hailing and microtransit services accommodate customers who use mobility devices within reasonable wait times. This project type can involve accessible vehicle acquisition, driver training and operating subsidies. Also, wheelchair-accessible services delivered by private providers (such as taxis) can offer cost-effective ways to provide specialized transportation.

The use of wheelchair-accessible taxis for people to get to dialysis, for example, could help curb the cost to public agencies and improve the customer’s transportation experience. MetroAccess is a shared-ride, pre-arranged service and the length of time a dialysis patient, who may not be feeling well, is in a vehicle could also be reduced using taxis. Ride-hailing companies can partner with health care providers to offer patients rides to medical appointments given transportation challenges can be a common reason why people miss appointments.

Good Examples:

- ✓ TransportDC
- ✓ Abilities-Ride in Suburban MD
- ✓ MontCo Union Taxi Cooperative
- ✓ Uber Health

G. Volunteer Driver Programs

Trained volunteers drive agency-owned or private vehicles to transport seniors and people with disabilities to wherever they need to go. Volunteer driver programs fill an important niche in outer and rural areas where transportation options are more limited and as a more affordable option for riders requiring an extra hand with groceries or navigation of a medical office building.

Good Examples:

- ✓ Jewish Council for the Aging's Village Rides and Volunteer Driver Resource Center programs.
- ✓ Capitol Hill Village
- ✓ NV Rides

H. Tailored Transportation Service for Clients of Human Service Agencies (e.g. Vehicle Acquisition)

This project would assist people with disabilities who utilize agency services, but for whom public transit is not a viable option, either because of the unavailability of transit or due to the nature of their disability. One option is that agencies provide transportation to their clients by contracting with a provider, or with directly owned or leased vans. Human service agencies could also coordinate and potentially share vehicles, maintenance, insurance, operating support, and driver training between agencies to provide agency-specific transportation for clients.

Good Examples:

- ✓ The Arc of Montgomery County, The Arc of Prince George's County, and the Arc of Greater Prince William/INSIGHT, Inc.
- ✓ Seabury Resources for Aging

Funding Types and Match Amounts

There are a variety of project types and eligible activities for which Enhanced Mobility funds can be used, and the types of funding and match requirements create the possibility for confusion. Table 3 includes common eligible activities under the Section 5310 program and the type of funding that each activity would be funded as. The activities in the table are not intended to be an exhaustive list, only to provide guidance.

SECTION 5: STRATEGIES FOR IMPROVED SERVICE AND COORDINATION

Background

Many agencies involved in providing transportation services will agree that there are tangible benefits to coordination of services. However, barriers both real and perceived exist that constrain the ability of providers and other agencies to coordinate services and realize benefits both for themselves and their clients.

Common barriers to coordination include lack of resources, different training requirements or vehicle specifications, and funding requirements. Some, like the sharing of information across jurisdictions, are more easily addressed through structured, regular meetings among agencies and providers. Other barriers present greater challenges. Issues like insurance and liability are more complex challenges that require ongoing efforts and dialogue with numerous agencies, providers, nonprofits and insurers. Another significant barrier to coordination is the multitude of government programs and funding requirements. Over the past 30 years, federal, state and local governments have implemented various programs aimed at improving coordination of publicly funded transportation services for transportation disadvantaged populations, including people with disabilities, Medicaid recipients, and other human service agency clients. Unfortunately, barriers to coordination still exist, and many stem from the administrative and eligibility requirements imposed by government rules and regulations.

In fact, areas that have had the most success in coordination occur when coordination is mandated by state or local agencies and institutional support is provided to make the coordination happen. Given that this region includes two states and the District of Columbia, and multiple counties and cities, each with its own set of transportation programs and accompanying rules, coordination is challenging.

Opportunities for Coordination and Mobility Management

The AFA can play a role in facilitating discussions about coordination opportunities; however, local jurisdictions should explore opportunities for collaboration.

The region experienced successful coordination under Enhanced Mobility by funding and successfully guiding implementation of mobility management projects such as the Northern Virginia Mobility Access Project (NVMAP) and Montgomery County Maryland's Department of Health and Human Services' Enhancing Montgomery's Mobility project.

Both the NVMAP and Enhancing Montgomery's Mobility projects coordinated with various governmental departments with an interest or need for transportation and involved local non-profit providers of transportation to help identify and close gaps in service. Collaborative outreach efforts were used by both projects to get the word out about available options. Next steps for the NVMAP project include coordinating with a non-profit organization serving Vietnamese older adults to develop a language-specific transportation guide and with a transportation management

organization to help recruit and train bilingual drivers and volunteers, and to provide travel training in Spanish. In 2009 the Prince William County Area Agency on Aging worked with non-project agencies and transportation providers and developed county-wide mobility management plan that identified gaps in services that could be filled strategically.

These types of collaborative projects can be time and labor intensive but can offer important transportation information and services to individuals needing them.

Strategies for Improved Service and Coordination

FTA rules require that all projects funded under the Enhanced Mobility program must either address a strategy or a priority project in the Coordinated Plan. The strategies below were broadly defined to address the unmet transportation needs that the AFA previously identified under four themes: availability, accessibility, awareness and affordability. Proposals submitted for funding must be responsive to at least one of the following four strategies. Some projects may have a greater overall impact on unmet needs, and accordingly are a greater priority for funding.

The strategies have been developed to reflect the unique transportation needs facing both older adults and people with disabilities --with limited incomes and who are most-likely transit-dependent-- to reflect the importance of changes in demographics and in travel patterns; and to reflect the ongoing need for additional transportation options.

I. EXPAND AVAILABILITY AND COORDINATION OF TRANSPORTATION OPTIONS

- Coordinate transportation services and programs within and across jurisdictions:
 - Make cross-jurisdictional transportation easier to access
 - Coordinate transportation operations among providers such as vehicle-sharing, joint fuel purchase, shared maintenance etc.
 - Involve private providers in service delivery
 - Involve potential stakeholders during the planning phase
 - Use mobility managers to promote coordination and help individuals plan the whole trip (determining available options, researching eligibility, and applying and scheduling if needed)
 - Use Enhanced Mobility grants to jump start the planning process needed to make coordination happen
- Make services more frequent and reliable including those that address the East-West divide (promotion and addition of services that connect the eastern side of the region to the western side)
- Add more reliable and timely transportation options for those who cannot drive which address gaps when Metro is not running, particularly for:
 - urgent and same day service
 - weekend and evening service

- Improve the timeliness of specialized services so that wait times and time on the vehicle is reasonable

II. INCREASE AWARENESS OF EXISTING TRANSPORTATION SERVICES

- Provide better and centralized information about existing specialized transportation options, (e.g. one-call, one-click services). Target and customize marketing of services to particular groups, including neighbors and caregivers, and offer the information in a variety of formats, including in languages other than English.
- Transportation providers should support customer-empowered communication with clear and concise information using plain language about services, and customer rights and responsibilities
- Transportation agencies and providers should use customer satisfaction surveys to find out how effective their communication is and how satisfied customers are with their transportation services
- Create and revise websites to be user-friendly with easy navigation and provide access to a variety of users, including those with vision impairments and meet the highest standards for ADA website compliance
- Provide information on specialized transportation services in formats other than via websites (e.g. brochures and flyers)
- Provide safety education for users and drivers on pedestrians, bicycles, and other non-motorized modes of travel such as electric scooters
- Train front-line staff to improve communication, interactions and understanding of user needs and concerns

III. IMPROVE ACCESSIBILITY OF TRANSPORTATION OPTIONS

- Create and maintain safe and accessible pathways to and from bus and rail stations
- Provide first mile/last mile connections to bus and rail stations (e.g. shuttle, taxi and ride-hailing services)
- Make ride-hailing services, taxis and microtransit accessible to people who use mobility devices and for those without smart phones
- Improve the accessibility and ease of use of payment-systems
- Provide training on transportation-related websites and technology (apps, payment systems).
- Consider accessibility in the planning and design phase of projects and involve people with disabilities and older adults

IV. MAKE TRANSPORTATION OPTIONS MORE AFFORDABLE AND SUSTAINABLE

- Offer affordable options for all income levels, i.e. people who don't qualify as low-income yet cannot afford some services. Transit fares, parking costs and tolls can be barriers.

- Subsidize rides for those who cannot afford the cost (user-side subsidies for transit, taxis, and ride-hailing services)
- Identify new revenue streams to sustain and increase specialized transportation options needed
- Make programs and services sustainable after grant funding ends
- Identify cost-efficient ways to provide specialized services (e.g. alternatives to MetroAccess)
- Prioritize projects that assist people with disabilities and older adults with limited-incomes
- Build on or duplicate efficient and effective existing transportation options rather than creating entirely new services
- Evaluate new transportation services or pilots to identify lessons learned and build upon successes

Enhanced Mobility of Seniors and Individuals with Disabilities Program

Procurement Procedures – Updated November 2018

Procurement Procedures:

The Metropolitan Washington Council of Governments (COG) conducts centralized procurement for vehicles funded by the 5310 Enhanced Mobility Program. Procurement activities using Federal funds for items other than vehicles are the responsibility of the subrecipient and are subject to federal procurement requirements.

To comply with federal procurement requirements, subrecipients must do the following:

- ✓ **IF** the procurement falls into Category III, \$250,000 and above, ensure that prices are fair and reasonable by conducting an independent cost estimate (ICE) for any equipment (other than vehicles to be procured by COG), preventive maintenance and contracted service. The ICE is completed as part of research into cost of a budgeted line item at time of application. Examples of applicable line items include construction, software, dispatch, or GPS systems, evaluation or marketing contractors and printing services. An ICE is not required for services provided in-house by agency staff. The vendor that is ultimately awarded cannot be the same as the vendor that provides the ICE, therefore hired contractors and in-house staff (i.e. Engineer for a construction project) can develop the ICE if they have the applicable skills.
- ✓ When preparing for purchase under Category II/Simplified Procurement, obtain 2-3 written quotes using a price analysis, complete a comprehensive evaluation to determine best combination of price, quality, and other elements that are optimal to need, and obtain written concurrence from COG prior to the purchase of goods and services by submitting a request letter on agency letterhead to:

Lynn Winchell-Mendy
Grants Manager
Metropolitan Washington Council of Governments
777 North Capitol Street, N.E.
Ste. 300
Washington, DC 20002

Request letter can be attached to an email and sent to lmendy@mwkog.org

- ✓ Encourage the distribution of purchases equitably among local vendors, ensuring that no geographic preferences are shown in any procurement.
- ✓ Keep an annually updated record of all quotes received and a description of why each vendor was selected.

- ✓ Convey to vendors that the purchase is made with federal funds and, by fulfilling the purchase request, the vendor is agreeing to abide by all federal terms and conditions
 - Federal Contract Clauses must be attached to any contract or purchase order issued. See pgs. 8-9.
 - ✓ Maintain file copies of all procurements using 5310 Enhanced Mobility funds by Fiscal Year
 - ✓ Ensure that procurements do not discriminate against businesses as prohibited by federal and state law
 - ✓ Check the status of a proposed vendor or contractor to ensure they are in good standing; not fraudulent, debarred or technically unqualified by verifying their status with the System for Award Management (SAM) <https://www.sam.gov/portal/SAM/#1>
-

Categories of purchases and applicable requirements

Category I - Micro Purchases up to \$10,000

For purchases up to \$10,000, quotes are NOT required and awards are made on the judgment of the recipient. Micro-purchases should be distributed equitably among qualified vendors. Document the procurement file with a determination of fair and reasonable price (recent purchase of similar item, current price list, current catalog, advertisements, personal knowledge, etc.). No concurrence from COG is required.

Category II - Simplified Procurements between \$10,001 and \$249,999

For purchases between \$10,001 and \$249,999 at least 3 fair and reasonable, written quotes should be received, reviewed, and evaluated using a comprehensive evaluation system. Awards are made on best combination of price, quality and other elements optimal to need as determined by the subrecipient. Obtain written concurrence from COG prior to the purchase of goods and services by submitting a request letter to COG. Document the procurement file with items listed above.

Category III - Procurements at \$250,000 or more

Any subrecipient conducting a procurement at \$250,000 or more must contact COG before initiating any procurement activity. Purchases exceeding the simplified purchase threshold of \$249,999 must be competitively bid using a Request for Proposal (RFP) or Invitation for Bid (IFB). An ICE is required for this type of procurement before requesting bids and should have been completed as part of research into cost of a budgeted line item at time of application. Responses

must be fairly reviewed and considered and bids and selection justification provided to COG for written concurrence before any offer is accepted or a contract is executed.

Sole source justifications are allowed under certain circumstances and require documentation on the lack of other vendors to do the work, how the preferred vendor is uniquely qualified, and a Cost Analysis (because price competition is inadequate). Please contact staff for consideration.

Independent Cost Estimate (ICE) Form

(Submitted at time of application as proof of cost research for applicable budgeted line items of \$250,000 or more. Used later to determine if bids are fair and reasonable).

Per FTA 4220.1F, it is required that before receiving bids or proposals for a procurement using Federal funds that an Independent Cost Estimate (ICE) be performed. COG requires this at time of application. An ICE can be completed using past purchase prices, quantities, physical inspection of the product, drawings, or analysis of similar work. For more complex projects, an ICE can be completed by independent architect or engineer that will provide estimated hours, direct and indirect labor costs, and estimated profit or fee for a particular project.

[INSERT NAME OF AGENCY]
Agency LOGO/Letterhead

Project Name:

Project Description:

Vendor:

Phone:

Email:

Item:

Date of Estimate:

Method of Obtaining Estimate (check appropriate section and attach supporting documentation)

- Published List Price:
- Past Pricing (date):
- Comparable Purchase by Other Agencies
- Engineering or Technical Estimate
- Independent Third Party Estimate
- Other (specify):

Through the method(s) statement above, it has been determined that the estimate total cost of the goods/services is \$ _____:

Prepared by:

Phone:

Email:

Date Prepared:

Price Analysis Form (submitted when preparing for purchase):

Quote 1

[INSERT NAME OF AGENCY]

Agency LOGO/Letterhead

Project Name:

Contract #:

Item:

Vendor:

Phone:

Email:

Date of Estimate:

Estimate Amount (Supporting documentation needs to be attached for Category II items (\$10,001 - \$249,999):

Additional Comments:

Prepared by:

Phone:

Email:

Date Prepared:

Price Analysis Form (submitted when preparing for purchase):

Quote 2

[INSERT NAME OF AGENCY]
Agency LOGO/Letterhead

Project Name:

Contract #:

Item:

Vendor:

Phone:

Email:

Date of Estimate:

Estimate Amount (Supporting documentation needs to be attached for Category II items (\$10,001 - \$249,999):

Additional Comments:

Prepared by:

Phone:

Email:

Date Prepared:

Price Analysis Form (submitted when preparing for purchase):

Quote 3

[INSERT NAME OF AGENCY]
Agency LOGO/Letterhead

Project Name:

Contract #:

Item:

Vendor:

Phone:

Email:

Date of Estimate:

Estimate Amount (Supporting documentation needs to be attached for Category II items (\$10,001 - \$249,999):

Additional Comments:

Prepared by:

Phone:

Email:

Date Prepared:

Federal Contract Clauses:

APPLICABILITY OF THIRD PARTY CONTRACT PROVISIONS

(excluding micro-purchases, except Davis-Bacon requirements apply to contracts exceeding \$2,000)

TYPE OF PROCUREMENT

PROVISION	Professional Services/A&E	Operations/ Management	Rolling Stock Purchase	Construction	Materials & Supplies
No Federal Government Obligations to Third Parties (by Use of a Disclaimer)	All	All	All	All	All
False Statements or Claims Civil and Criminal Fraud	All	All	All	All	All
Access to Third Party Contract Records	All	All	All	All	All
Changes to Federal Requirements	All	All	All	All	All
Termination	>\$10,000 if 49 CFR Part 18 applies.	>\$10,000 if 49 CFR Part 18 applies.	>\$10,000 if 49 CFR Part 18 applies.	>\$10,000 if 49 CFR Part 18 applies.	>\$10,000 if 49 CFR Part 18 applies.
Civil Rights (Title VI, ADA, EEO except Special DOL EEO clause for construction projects)	All	All	All>\$10,000	All	All
Special DOL EEO clause for construction projects				>\$10,000	
Disadvantaged Business Enterprises (DBEs)	All	All	All	All	All
Incorporation of FTA Terms	All	All	All	All	All
Debarment and Suspension	>\$25,000	>\$25,000	>\$25,000	>\$25,000	>\$25,000
Buy America			>\$100,000 As of Feb. 2011, FTA has not adopted the FAR 2.101 \$150,000 standard.	>\$100,000 As of Feb. 2011, FTA has not adopted the FAR 2.101 \$150,000 standard.	>\$100,000 As of Feb. 2011, FTA has not adopted the FAR 2.101 \$150,000 standard.
Resolution of Disputes, Breaches, or Other Litigation	>\$100,000	>\$100,000	>\$100,000	>\$100,000	>\$100,000
Lobbying	>\$100,000	>\$100,000	>\$100,000	>\$100,000	>\$100,000
Clean Air	>\$100,000	>\$100,000	>\$100,000	>\$100,000	>\$100,000
Clean Water	>\$100,000	>\$100,000	>\$100,000	>\$100,000	>\$100,000
Cargo Preference			Transport by ocean vessel.	Transport by ocean vessel.	Transport by ocean vessel.
Fly America	Foreign air transp. /travel.	Foreign air transp. /travel.	Foreign air transp. /travel.	Foreign air transp. /travel.	Foreign air transp. /travel.

TYPE OF PROCUREMENT					
PROVISION	Professional Services/A&E	Operations/ Management	Rolling Stock Purchase	Construction	Materials & Supplies
Davis-Bacon Act				>\$2,000 (also ferries).	
Contract Work Hours and Safety Standards Act		>\$100,000 (transportation services excepted).	>\$100,000	>\$100,000 (also ferries).	
Copeland Anti-Kickback Act Section 1 Section 2				All > \$2,000 (also ferries).	
Bonding				\$100,000	
Seismic Safety	A&E for new buildings & additions.			New buildings & additions.	
Transit Employee Protective Arrangements		Transit operations.			
Charter Service Operations		All			
School Bus Operations		All			
Drug Use and Testing		Transit operations.			
Alcohol Misuse and Testing		Transit operations.			
Patent Rights	R & D				
Rights in Data and Copyrights	R & D				
Energy Conservation	All	All	All	All	All
Recycled Products		EPA-selected items \$10,000 or more annually.		EPA-selected items \$10,000 or more annually.	EPA-selected items \$10,000 or more annually.
Conformance with ITS National Architecture	ITS projects.	ITS projects.	ITS projects.	ITS projects.	ITS projects.
ADA Access	A&E	All	All	All	All
Notification of Federal Participation for States	Limited to States.	Limited to States.	Limited to States.	Limited to States.	Limited to States.

Procurement Resources:

- [FTA CIRCULAR 4220.1F- Third Party Contracting Guidance](#)
- [2 CFR 200](#)
- [FTA's Best Practices Procurement Manual](#)

TPB Enhanced Mobility Program Application: TWO-YEAR CAPITAL or MOBILITY MGT BUDGET



Metropolitan Washington
Council of Governments

Project Name:

Organization Name:

Round down Round up

	TOTAL BUDGET	FTA FUNDS Requested (80%)	RECIPIENT FUNDS (Match-20%)	NUMBER JUSTIFICATION Explain how you calculated the figures-- show the math used.	SOURCE OF MATCH Cash on Hand, general revenue, outside resources, other
<u>BUDGET LINE ITEMS</u>					
Acquisition of Equipment other than vehicles (add line items below)		-	-		
		-	-		
		-	-		
Computer Hardware and Software (describe)		-	-		
		-	-		
Mobility Management Activities (describe in line items below)		-	-		
		-	-		
		-	-		
		-	-		
		-	-		
		-	-		
TOTALS	-	-	-		

Budget Narrative Instructions:

Applications must specify dollar amounts in the broad categories provided in the budget document as applicable:

Acquisition of equipment may include improvements, design, construction, etc.

Other Equipment include costs such as modifications, attachments, accessories, or auxiliary apparatus necessary to make the equipment usable for the intended purpose. For example, GPS on vehicles.

Computer Hardware & Software

Mobility Management Activities include individual or systems level services such as planning, implementing and providing coordination services, travel training and other activities that facilitate access to transportation services.

Line item descriptions may be added or changed to be more specific. When adding items, please use Borders, Wrap Text and Merge & Center formatting features.

Indirect costs, food, rent, furniture are not allowable expenses.

Use whole numbers. Round Federal share down and match share up to the nearest dollar.

Match is required. Capital or Mobility Management project match is 20%. Round match up to the nearest dollar.

Total Budget is the sum of the amount of FTA funds requested plus Match funds. Round the Federal share down and the match up to the nearest dollar.

The Number Justification portion of the budget must include detail (calculations) of how you determined the cost. For example, pay rate x number of hours x 2-year grant period.

Applicants must conduct an independent cost estimate (ICE) for any equipment (other than vehicles to be procured by COG), preventive maintenance and contracted service in excess of \$250,000 that is included in the budget. For example, software dispatch, or GPS systems, evaluation or marketing contractors, printing services. There is a space in the application for upload of ICE forms. See COG's Procurement Procedures for details.

The Source of Match portion of the budget must include detail regarding where the match funds are coming from. The application requires upload of match documentation.

TPB Enhanced Mobility Program Application: TWO-YEAR CAPITAL BUDGET

Project Name:

Organization Name:



Round down Round up

	Round down	Round up		
TOTAL BUDGET	FTA FUNDS Requested (80%)	RECIPIENT FUNDS (Match- 20%)	NUMBER JUSTIFICTION Explain how you calculated the figures -- show the math used.	SOURCE OF MATCH Cash on Hand, general revenue, outside resources, other
<u>BUDGET LINE ITEMS</u>				
Vehicles Base Price	-	-		
Vehicle Options				
10% Contingency	-	-		
Vehicle Equipment (GPS, radios, software etc.)		-		
Vehicle Preventive Maintenance or Rehab		-		
Other (please describe)		-		
TOTALS	-	-		

Budget Narrative Instructions:

Applications must specify dollar amounts in the broad categories provided in the budget document as applicable:

Vehicles - Base price of vehicle plus estimated cost of options.

Find vehicle pricing here: <http://www.drpt.virginia.gov/about/Contract%20Summary%20for%20Website.htm>

10% contingency - to accommodate fluctuations in vehicle pricing and/or other considerations

Vehicle Maintenance or Rehab may include costs such as repairs, oil changes, etc.

Other Equipment include costs such as modifications, attachments, accessories, or auxiliary apparatus necessary to make the equipment usable for the intended purpose. For example, GPS on vehicles. ICE is required for items over \$250,000

Budgets are for a 2-year period. Requests for preventive maintenance and/or operating expenses for vehicles that are part of the same application will be for 3-years to accommodate timing of vehicle delivery.

Line item descriptions may be added or changed to be more specific. When adding items, please use Borders, Wrap Text and Merge & Center formatting features.

Indirect costs, food, rent, furniture are not allowable expenses.

Use whole numbers. Round Federal share down and match share up to the nearest dollar.

Match is required. Capital project match is 20%. Round match up to the nearest dollar.

Total Budget is the sum of the amount of FTA funds requested plus Match funds. Round the Federal share down and the match up to the nearest dollar.

The Number Justification portion of the budget must include detail (calculations) of how you determined the cost. For example, pay rate x number of hours x 2-year grant period.

Applicants must conduct an independent cost estimate (ICE) for any equipment (other than vehicles to be procured by COG), preventive maintenance and contracted service in excess of \$250,000 that is included in the budget. For example, software dispatch, or GPS systems, evaluation or marketing contractors, printing services. There is a space in the application for upload of ICE forms. See COG's Procurement Procedures for details.

The Source of Match portion of the budget must include detail regarding where the match funds are coming from. The application requires upload of match documentation.

TPB Enhanced Mobility Program Application: TWO-YEAR OPERATING BUDGET

Project Name:

Organization Name:



BUDGET LINE ITEMS	round down		round up	NUMBER JUSTIFICATION Explain how you calculated the figures-- show the math used.	SOURCE OF MATCH Cash on Hand, general revenue, outside resources, other
	TOTAL BUDGET	FTA FUNDS Requested (50%)	RECIPIENT FUNDS (Match- 50%)		
Salaries		#VALUE!	#VALUE!		
Fringe Benefits		#VALUE!	#VALUE!		
Meeting/Training Expenses		-	-		
Vehicle Operating Costs		-	-		
Service Operating Costs		-	-		
Marketing/Media/Outreach		-	-		
Focus Groups/Survey Costs		-	-		
Travel		-	-		
Other		-	-		
		-	-		
TOTALS	-	#VALUE!	#VALUE!		



Certification of Availability of Matching Funds

The undersigned hereby certifies that _____ is authorized
(applicant)
to enter into an Agreement with the Metropolitan Washington Council of Governments to receive a Federal Transit Administration (FTA) Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities grant should a grant be awarded.

The Enhanced Mobility program requires matching funds of twenty percent (20%) of total Capital costs and fifty (50%) of total Operating costs.

The undersigned hereby certifies that _____ agrees to provide the following amount of requisite total matching funds (Capital and operating):

The source(s) of these funds are (describe and provide amounts from project partners, if available):

Signature: _____

Name (Printed): _____

Title: _____

Organization: _____

Date: _____

Agency:XXXXXXXXXXXXXXXXXXXXX
 Project Title: XXXXXXXXXXXXXXXXXXXXXXXX

Goal #1:										
Objective/Major Activity:	Benchmarks (outputs)	Timeline								Estimated Completion Date (month end)
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
1.										
2.										
3.										

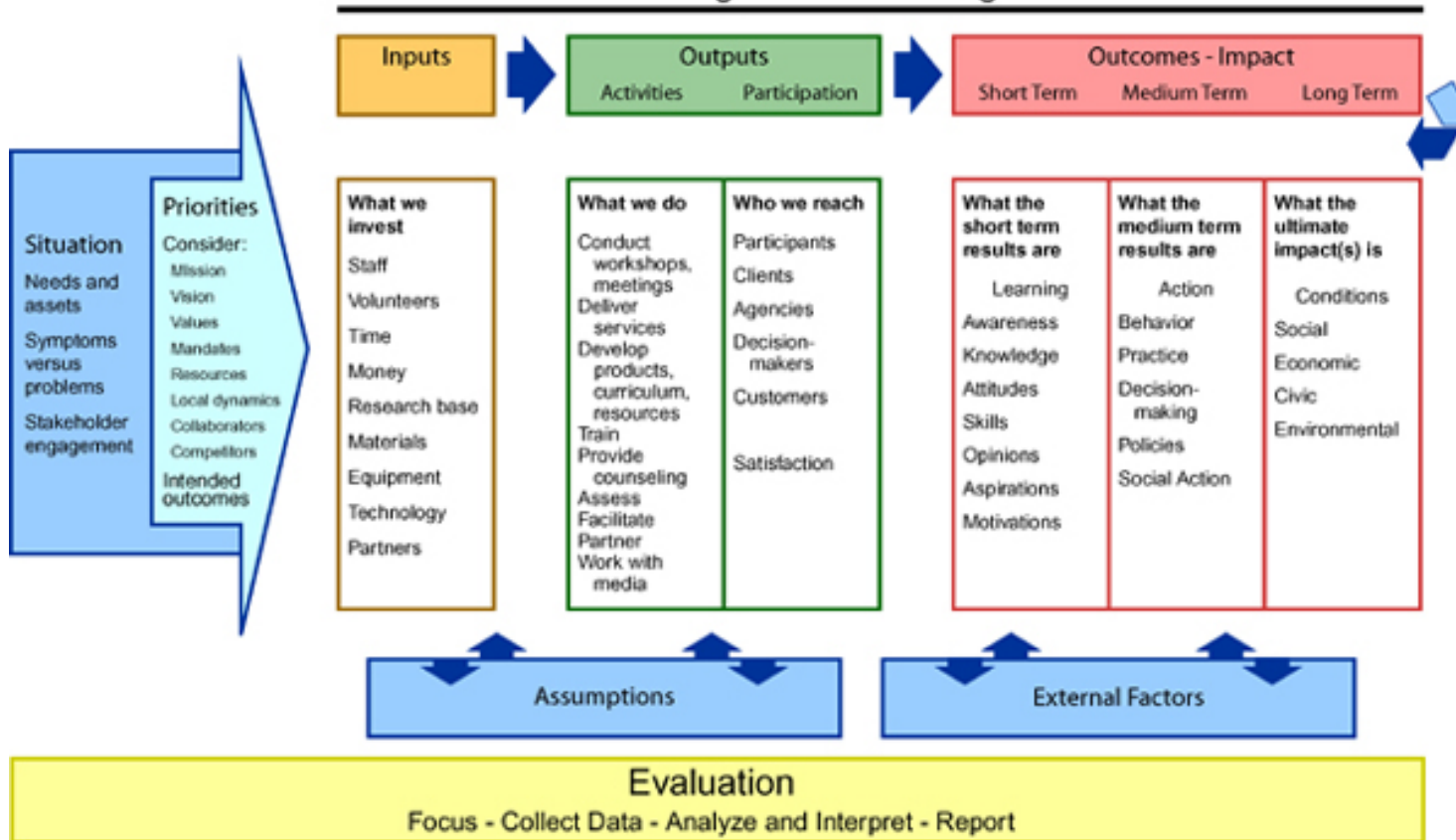
Goal #2:										
Objective/Major Activity:	Benchmarks (outputs)	Timeline								Estimated Completion Date (month end)
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
1.										
2.										
3.										

Goal #3:										
Objective/Major Activity:	Benchmarks (outputs)	Timeline								Estimated Completion Date (month end)
		Q1 /month end date	Q2 /month end date	Q3 /month end date	Q4 /month end date	Q1 /month end date	Q2 /month end date	Q3 /month end date	Q4 /month end date	
1.										
2.										
3.										

NOTES:

- See Appendices in application for an example of a completed Work Plan.
- Put a check mark in the boxes for the quarters in which the activity will occur.
- The activities will translate into milestones shared with FTA via a Quarterly Work Plan/Milestones Report. Because each grant starts at a different time (when contract is fully executed) the above quarters will become month end dates for quarterly reporting.
- Goals are broad and represent what will happen as a result of your work (see Outcomes in chart below). A starting point might be the goals of United We Ride tailored to your region: <https://www.transit.dot.gov/ccam/resources/united-we-ride-brochure>.
- The form can be expanded to track more goals but selected goals should be the major activities of the project not every single action. Unused tables or lines can be deleted.
- Objectives are narrower goals (see Activities below). What actions will you take to reach the goal?
- Benchmarks are ways you will meet the Objective (outputs). What are the direct products of your actions? These are often numeric - # of rides, number of events, number of people, etc.

Program Action - Logic Model



Courtesy of NADTC

Updated 4/21/21

SECTION 7: FRAMEWORK FOR COMPETITIVE SELECTION

The competitive selection process includes a selection committee, chaired by the Access for All Advisory Committee chair or another TPB representative. Selection committee members have expertise locally or nationally with transportation for older adults and people with disabilities. Members will review the applications based on the selection criteria and will make a set of funding recommendations to the TPB. The TPB will be asked to approve the recommendations based on the selection committee's deliberations.

The selection criteria have been reevaluated based on the TPB's experience in awarding and administering grants for the Enhanced Mobility program as well as the previous experience with grants administration for JARC and New Freedom. Changes to the selection criteria emphasize the importance of project feasibility and an agency's institutional capacity to manage an FTA grant. In addition, since the TPB adopted Equity Emphasis Areas in the region in 2017, which are Census tracts with concentrations of low-income and/or minority populations⁸, the selection criteria now include an emphasis on serving these traditionally-underserved communities. The following selection criteria include a maximum of 100 total points:

Coordination Among Agencies (25 points)

Coordination of services with other organizations can include providing service to clients of multiple agencies, coordinated purchasing, joint project planning and operation.

Responsiveness to TPB's Coordinated Human Service Transportation Plan (20 points)

Up to 12 points will be awarded based on how many Priority Projects in the Coordinated Plan that the project application addresses, and up to 8 points on how well the application responds to the strategies.

Institutional Capacity to Manage and Administer an FTA grant (20 points)

This criterion considers the availability of sufficient management, staff and resources to implement an FTA grant, stable and sufficient sources of funds to provide required match and if applicable, past grant performance.

Project Feasibility (15 points)

Proposed activities are consistent with the objectives of funding, application clearly spells out how a project will be implemented, with defined roles and responsibilities, and include an action plan with milestones that is achievable within the 2-year timeframe.

Regional Need (5 points)

Up to 5 points will be awarded for applications that propose to serve more than one jurisdiction in the Washington DC-VA-MD Urbanized Area shown in Figure 5 below.

⁸ To learn more about the Equity Emphasis Areas, visit www.mwcog.org/transportation/planning-areas/fairness-and-accessibility/environmental-justice/equity-emphasis-areas/

Equity Emphasis Areas (5 points)


Up to 5 points will be awarded for projects proposing to serve Equity Emphasis Areas in the Washington DC-VA-MD Urbanized Area shown in Figure 5 below.

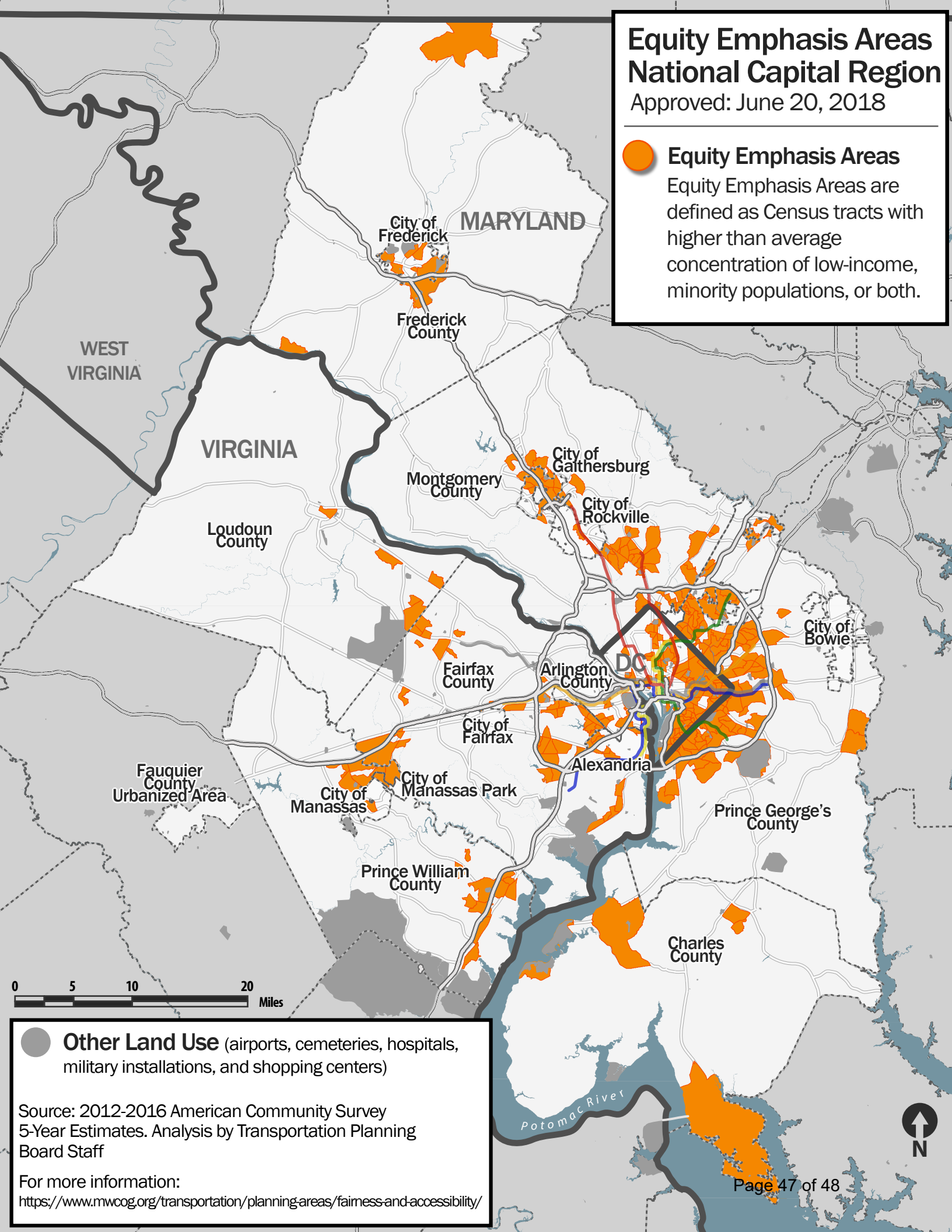
Customer Focus and Involvement (10 points)


To what extent does the applicant demonstrate an awareness of the needs of a targeted population group and how will customers be involved in the development and implementation of the proposed activity. Consideration will be made if the applicant agency is already directly serving the targeted population.

Equity Emphasis Areas National Capital Region

Approved: June 20, 2018

 **Equity Emphasis Areas**
Equity Emphasis Areas are defined as Census tracts with higher than average concentration of low-income, minority populations, or both.



 **Other Land Use** (airports, cemeteries, hospitals, military installations, and shopping centers)

Source: 2012-2016 American Community Survey 5-Year Estimates. Analysis by Transportation Planning Board Staff

For more information:
<https://www.mwco.org/transportation/planning-areas/fairness-and-accessibility/>

The 2010 Washington DC-VA-MD Urbanized Area, As Defined by the U.S. Census

