



**Scoring Worksheet**  
**Capital Application for Vehicles and  
Related Equipment**

**Orange County Enhanced Mobility  
for Seniors & Disabled Grant Program**

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| <b>Section B</b> | Ability of Applicant .....               | 3             | 20                        |
| <b>Section C</b> | Coordination Planning .....              | 4             | 12 + 5 bonus              |
| <b>Section D</b> | Outreach and Feedback.....               | 5             | 10                        |
| <b>Section E</b> | Transportation Service.....              | 6             | 32 + 5 bonus              |
| <b>Section F</b> | Emergency Planning and Preparedness..... | 10            | 10                        |
|                  |  | <b>Total*</b> | <b>100 + 10 bonus</b>     |

**\*The total maximum score for an application will not exceed 100.**

## Scoring Worksheet for Capital Applications

### A. Program Goals and Objectives (Maximum 16 points)

Score

|   |  |
|---|--|
| <b>Exceptional (11-16 points):</b> Applicant exceeds minimum standards set for demonstrating that the project is consistent with the overall EMSD program goals and objectives and meets all consideration factors.                                   |  |
| <b>Satisfactory (6-10 points):</b> Applicant meet minimum standards set for demonstrating that the project is consistent with the overall EMSD program goals and objectives and meets some of the consideration factors.                              |  |
| <b>Unsatisfactory (0-5 points):</b> Applicant fails to meet minimum standards set for demonstrating that the project is consistent with the overall EMSD program goals and objectives and either does not or narrowly meet the consideration factors. |  |
| <b>Comments:</b>  |  |

## Scoring Worksheet for Capital Applications

### **B. Ability of Applicant (20 points)**

Evidence of an applicant's experience and history of providing efficient and effective transit services.

Score

|   |  |
|---|--|
| <p><b>1a.</b><br/>Applicant has experience providing existing specialized transportation services for seniors or individuals with disabilities for:</p> <p style="text-align: right;">More than 5 years = 4 ____<br/>3 to 5 years = 3 ____<br/>1 to &lt; 3 years = 2 ____<br/>Less than 1 year = 0 ____</p> <p style="text-align: center;"><b>OR</b></p> <p><b>1b.</b><br/>Applicant has experience in providing social services (non-transportation) for seniors or individuals with disabilities:</p> <p style="text-align: right;">Applicant demonstrates support from the local RTPA or CTSA (attach letter) = 2 ____<br/>And applicant has provided social services for<br/>More than 3 years = 2 ____<br/>1 to 3 years = 1 ____<br/>Less than 1 year = 0 ____</p>   |  |
| <p><b>Scoring criteria for the following questions:</b><br/>0 = Does not address question<br/>1 = Addresses question without attaching relevant documentation.<br/>2 = Addresses question completely and attaches relevant documentation</p> <p><b>2. Driver training program:</b><br/>New and continuing driver training, including classroom and road testing = 2 ____<br/>Sensitivity Training, Emergency Preparedness, First Aid, and CPR = 2 ____</p> <p><b>3. Dispatching Plan:</b><br/>Description of dispatching plan with ongoing training = 2 ____</p> <p><b>4. Maintenance plan including the following:</b><br/>Daily Pre- and post- trip inspection description with inspection forms = 2 ____<br/>Preventative and routine maintenance description with maintenance schedule and forms = 2 ____<br/>Contingency plans for when equipment is not available for service = 2 ____</p> <p><b>5. California Highway Patrol (CHP) Inspections</b><br/>Inclusion of satisfactory CHP or Caltrans inspection or documentation that such an inspection is not required = 2 ____</p> <p><b>Annual Budget/Fund Sources/Proposed Budget for Transportation Program:</b></p> <p><b>6.</b> All sources of estimated income are identified for proposed project. (not scored)<br/><b>7.</b> Budget for applicant agency includes prior, current, and budget year. (not scored)<br/><b>8.</b> Appropriate funding source for local match is identified. (not scored)<br/><b>9.</b> Agency describes other funding received or why other funding is not available = 2 ____</p> |  |
| <b>Total Ability of Applicant Maximum 20</b>  |  |

## Scoring Worksheet for Capital Applications

### C. Coordination Planning (12 points, plus 5 bonus points)

0 – Does not address question and/or does not include Coordinated Plan section or page number

3 – Addresses question & indicated Coordinated Plan section and/or page number

**COORDINATED PLAN REQUIREMENTS** Maximum 12 points (3 points per question)

|  |  |
|--|--|
| <p><i>Applicant provides an assessment of available services that identifies current transportation providers (public, private, and non-profit).</i></p> <p>1. Generally describes available non-profit, public transit, or Paratransit, including fixed route, dial-a-ride, and ADA complementary Paratransit services as contained in the Coordinated Plan by section and/or page number.</p>  |  |
| <p><i>Applicant provides an assessment of transportation needs for seniors and individuals with disabilities. This assessment can be based on the experiences and perceptions of the planning partners or on more sophisticated data collection efforts, and gaps in service.</i></p> <p>2. Describes transportation needs of seniors and individuals with disabilities to be served by the proposed project as contained in the Coordinated Plan by section and/or page number.</p> |  |
| <p><i>Applicant provides strategies, activities, and/or projects to address the identified gaps between current services and needs, as well as opportunities to achieve efficiencies in service delivery.</i></p> <p>3. Identifies coordination strategies activities and/or efficiencies by name. Accurately describes <u>how this project addresses strategies, activities and/or efficiencies</u>. Includes section and/or page number of Coordinated Plan.</p>                   |  |
| <p><i>Applicant identifies priorities for implementation based on resources (from multiple program sources), time, and feasibility for implementing specific strategies and/or activities identified.</i></p> <p>4. Identifies the Coordinated Plan’s implementation priorities. Accurately describes <u>how this project addresses them</u>. Includes section and/or page number of Coordinated Plan.</p>   |  |
| <b>Total Coordination Planning Maximum 12</b>  |  |

### COORDINATION – USE OF VEHICLES/EQUIPMENT (5 BONUS POINTS)

(Required letters are attached as applicable).

|  |  |
|--|--|
| <p>5. Clearly describes how vehicles, equipment or services in agency’s <b>existing</b> fleet are used to provide coordinated service for another agency’s clients or how these vehicles are shared with another agency(s) (2 points).</p>   |  |
| <p>6. Clearly describes plan for coordinating use of <b>requested</b> vehicle(s) or equipment. (1 point per type of coordination or sharing of resources, up to 3 points.) Examples:</p> <ul style="list-style-type: none"> <li>• Dispatching or scheduling</li> <li>• Maintenance</li> <li>• Back up transportation</li> <li>• Staff training programs</li> <li>• Joint procurement of services and supplies from funding sources other than EMSD</li> <li>• Active participation in local social service transportation planning process</li> <li>• Other – please describe</li> </ul> |  |
| OR   |  |
| <p>7. Clearly identifies attempts the agency has made to coordinate. Explains why coordinating isn’t possible. Provides supporting documentation letter from CTSA or RTPA confirming that no opportunities for coordination currently exist for requested equipment.</p>   |  |
| <b>Bonus Point Maximum 5</b>   |  |

## Scoring Worksheet for Capital Applications

### D. Outreach and Feedback (10 points)

|  |
|--|
| <p><b>Exceptional (7-10 points):</b> Applicant exceeds minimum standards set for communication and outreach to target populations that benefit from the EMSD program. Applicant provides detail on their extensive efforts made and accomplishments in the coordination with other community transportation and/or social services resources in the project area. Communication goals and strategies are clearly identified. Applicant clearly describes outreach methods with clients and how feedback facilitates adjustments to service. Strategies to sustain the program beyond the two-year program are proposed. Include three (3) support letters from stakeholders.</p> |
| <p><b>Satisfactory (4-6 points):</b> Applicant meet minimum standards set for communication and outreach to target populations that benefit from the EMSD program. Applicant provides minimal information on their efforts made and accomplishments in the coordination with other community transportation and/or social services resources in the project area. Communication goals and strategies are identified. Applicant describes outreach methods with clients and how feedback facilitates adjustments to service. Include two (2) support letters from stakeholders.</p>   |
| <p><b>Unsatisfactory (0-3 points):</b> Applicant fails to meet minimum standards set for communication and outreach to target populations that benefit from the EMSD program. Applicant provides insufficient or no information on their efforts in the coordination with other community transportation and/or social services resources in the project area. Communication goals and strategies are not identified. Does not include any or includes one (1) support letter of support from stakeholder.</p>   |
| <p><b>Comments:</b></p>  |

### E. Transportation Service (32 points, plus 5 bonus points)

#### Existing Transportation Services

**REPLACEMENT** – Vehicles to be replaced that are currently in Active Service.

#### VEHICLE USEFUL LIFE CRITERIA

| TYPE OF VEHICLE                    | EXISTING VEHICLE MILES AND AGE                      | SCORE    |
|------------------------------------|---|----------|
| <b>Minivan, Modified Van</b>       | 175,000 to 200,000 or 8 years                       | ..... 20 |
|                                    | 150,000 to 174,999 or 7 years                       | ..... 15 |
|                                    | 125,000 to 149,999 or 6 years                       | ..... 10 |
|                                    | 100,00 to 124,999 or 5 years                        | ..... 5  |
|                                    | Less than 100,000 miles or 4 years old not eligible | ..... 0  |
| <b>Bus Type I, IA, IB, II, III</b> | 225,000 - 250,000 or 9 years                        | ..... 20 |
|                                    | 200,000 – 224,999 or 8 years                        | ..... 15 |
|                                    | 175,000 – 199,999 or 7 years                        | ..... 10 |
|                                    | 150,000 – 174,999 or 6 years                        | ..... 5  |
|                                    | Less than 150,000 or 5 years not eligible           | ..... 0  |

**Scoring Worksheet for Capital Applications**

|                      |  |          |
|----------------------|--|----------|
| <b>Bus Type VII</b>  | 275,000 – 300,000 or 11 years              | ..... 20 |
|                      | 250,000 – 274,999 or 10 years              | ..... 15 |
|                      | 225,000 – 249,999 or 9 years               | ..... 10 |
|                      | 200,000 – 224,999 or 8 years               | ..... 5  |
|                      | Less than 200,000 or 7 years not eligible  | ..... 0  |
| <b>Bus Type VIII</b> | 425,000 – 449,999 or 14 years              | ..... 20 |
|                      | 400,000 – 424,999 or 13 years              | ..... 15 |
|                      | 375,000 – 399,999 or 12 years              | ..... 10 |
|                      | 350,000 – 374,999 or 11 years              | ..... 5  |
|                      | Less than 350,000 or 10 years not eligible | ..... 0  |

**Replacement:** Determination that an applicant’s vehicle needs to be replaced in order to continue its existing transportation services. For each new vehicle requested a vehicle currently in **active service** will be removed and sold or placed into backup service. Sedans and SUVs are no longer eligible as replacement vehicles.

**Active Service:** Vehicle is providing service throughout the agency’s normal days and hours of operation. **Excessive**

**Maintenance:** Vehicle does not meet minimum useful life but needs to be replaced due to excessive maintenance. Requests must have prior approval from OCTA.

Use the chart below to score each replacement vehicle.

Maximum 20 points each

| Type of Vehicle | VIN - last 5 numbers | Disposition:<br>Sell or Backup | Mileage | Age | Score |
|-----------------|----------------------|--------------------------------|---------|-----|-------|
|                 |                      |                                |         |     |       |
|                 |                      |                                |         |     |       |
|                 |                      |                                |         |     |       |
|                 |                      |                                |         |     |       |
|                 |                      |                                |         |     |       |
|                 |                      |                                |         |     |       |
|                 |                      |                                |         |     |       |
|                 |                      |                                |         |     |       |

\* If requesting new system (base station and mobile radios) score under **Other Equipment**.

**Proposed Transportation Services**

**NEW OR SERVICE EXPANSION –** Determination that requested additional equipment would be fully utilized (days and hours, passenger trips, service area) including usage of vehicle by another agency through a coordination plan.

Use the chart below to score each new or service expansion vehicle.

Round to the nearest whole number.

Score

|  |   |
|--|---|
| Projected service hours per week to be provided with requested vehicle will increase total existing service hours by:<br>20+ = 4 points<br>16 to 19 = 3 points<br>13 to 15 = 2 points<br>10 to 12 = 1 point<br>< 10 hours = 0 points | <div style="border: 1px solid black; width: 100%; height: 100%;"></div> |
|--|---|

**Scoring Worksheet for Capital Applications**

**AND** Projected number of daily one-way **Passenger Trips** divided by Proposed total vehicle service hours:

6+ = 6      3 = 3  
 5 = 5      2 = 2  
 4 = 4      <2 = 0

|  |
|--|
|  |
|--|

**AND** Projected number of miles for proposed vehicle per day is:

> 105 miles per vehicle= 6 points

91 to 105 = 5

76 to 90 = 4

61 to 75 = 3

46 to 60 = 2

30 to 45 = 1

< 30 miles per vehicle = 0 points

|  |
|--|
|  |
|--|

**Maximum 15 Points**

| Proposed New or SE Vehicle | Total Score Each Vehicle |
|----------------------------|--------------------------|
|                            |                          |
|                            |                          |
|                            |                          |
|                            |                          |
|                            |                          |

## Scoring Worksheet for Capital Applications

**OTHER EQUIPMENT** - Determination that ancillary equipment will provide critical support to the applicant's transportation program.

Use the chart below to score each equipment request.

| Criteria   | Points   | Score |
|--|--|-------|
| 1. Equipment will coordinate fleet of <b>10 or more</b> vehicles | 10 vehicles = 15<br>9 vehicles = 13<br>8 vehicles = 11<br>7 vehicles = 9<br>6 vehicles = 7<br>5 vehicles = 5<br>4 vehicles = 3<br>3 vehicles = 1<br>1-2 vehicles = 0 |       |

|  |                       |  |
|--|-----------------------|--|
| 2. Applicant is currently using manual system for scheduling, vehicle tracking, etc. and/or has no dispatch communication equipment. | 5                     |  |
| OR   |                       |  |
| 3. Applicant needs to replace inadequate equipment to improve efficiency.<br><br>More than 5 years                                   | 5                     |  |
|  | Total<br>(Maximum 20) |  |

**Other Equipment:** Computer system, Software, Maintenance equipment, Communication system or other.

Describe and Score **each** request

**Maximum Points 20**

| Equipment Requested | Score |
|---------------------|-------|
|                     |       |
|                     |       |
|                     |       |



## Scoring Worksheet for Capital Applications

Determination that existing fleet is fully utilized (days and hours, passenger trips and service area) including usage of vehicle(s) by another agency through a coordination plan (12 points).

*Round to the nearest whole number.*

|   |                              |  |
|---|------------------------------|--|
| <b>Existing transportation provider:</b> Total service hours per week divided by number of vehicles (excluding vehicles in back up service):<br><p style="text-align: center;"><b>OR</b></p> <b>First-time transportation provider:</b> Total projected service hours per week divided by number of vehicles (excluding vehicles in back up service):   |                              | SCORE  |
| Over 20 hours per week = 6<br>16-19 = 5<br>13-15 = 4<br>10-12 = 3   | 8-9 = 2<br>6-7 = 1<br><5 = 0 |  |
| <b>AND Existing transportation provider:</b> Sum of the total one-way passenger trips per day divided by total service hours per day (excluding backup service):<br><p style="text-align: center;"><b>OR</b></p> <b>First-time transportation provider:</b> Projected number of daily one-way passenger trips divided by total vehicle service hours:   |                              | SCORE  |
| Over 6 passengers per service hour = 3<br>4-5 = 2   | 3 = 1<br><2 = 0              |  |
| <b>AND Existing transportation provider:</b> Total miles per day divided by number of vehicles (excluding backup vehicles):<br><p style="text-align: center;"><b>OR</b></p> <b>First-time transportation provider:</b> Projected number of miles for requested vehicle per day:   |                              | SCORE  |
| Over 50 miles per vehicle = 3<br>40-49 = 2  | 30-39 = 1<br><29 = 0         |  |
| <b>Bonus Question:</b> Is your agency partnering with another provider to create efficiencies and lower operating costs for service and/or increase vehicle revenue hours beyond the minimum 10 hours? If yes, please provide documentation of the partnership. Attachment(s) included? <input type="checkbox"/> Yes <input type="checkbox"/> No<br><br><i>Up to 5 additional bonus points will be awarded for partnerships that create efficiencies in lowering operating costs.</i> |                              | SCORE  |
|   |                              | 19+ hours = 5 pts<br>17-18 hours = 4 pts<br>15-16 hours = 3 pts<br>13-14 hours = 2 pts<br>11-12 hours = 1 pt<br>10 hours or less = 0 pts |
|   |                              | <b>Total Score (Up to 32 + up to 5 bonus)</b>  |

## Scoring Worksheet for Capital Applications

### F. Emergency Planning and Preparedness - (Maximum 10 points) Score

|   |  |
|---|--|
| <p><b>Exceptional (7-10 points):</b> Applicant exceeds minimum standards set for emergency planning and preparedness. Emergency planning and drill activities are clearly identified in detail. Applicant is included in the County OES response plan</p>   |  |
| <p><b>Satisfactory (4-6 points):</b> Applicant meet minimum standards set for emergency planning and preparedness. Emergency planning and drill activities are simply identified without much detail. Applicant is not included in the County OES response plan but provides details on the efforts made to be included in the response plan.</p> |  |
| <p><b>Unsatisfactory (0-3 points):</b> Applicant fails to meet minimum standards set for emergency planning and preparedness. Emergency planning and drill activities are not identified. Applicant is not included in the County OES response plan and does not provide information on efforts made to be included in the response plan.</p>     |  |
| <p><b>Comments:</b></p>   |  |

**Scoring Worksheet for Capital Applications**  
**Project Rating Worksheet**

Applicant: \_\_\_\_\_

Evaluator: \_\_\_\_\_

|    | Project Request | Replacement Vehicle - VIN | A (16 pts) | B (20 pts) | C (12 pts) | D (10 pts) | E (32 pts) | F (10 pts) | Bonus (up to 10 pts) | Total (100 pts) |
|----|-----------------|---------------------------|------------|------------|------------|------------|------------|------------|----------------------|-----------------|
| 1  |                 |                           |            |            |            |            |            |            |                      |                 |
| 2  |                 |                           |            |            |            |            |            |            |                      |                 |
| 3  |                 |                           |            |            |            |            |            |            |                      |                 |
| 4  |                 |                           |            |            |            |            |            |            |                      |                 |
| 5  |                 |                           |            |            |            |            |            |            |                      |                 |
| 6  |                 |                           |            |            |            |            |            |            |                      |                 |
| 7  |                 |                           |            |            |            |            |            |            |                      |                 |
| 8  |                 |                           |            |            |            |            |            |            |                      |                 |
| 9  |                 |                           |            |            |            |            |            |            |                      |                 |
| 10 |                 |                           |            |            |            |            |            |            |                      |                 |
| 11 |                 |                           |            |            |            |            |            |            |                      |                 |
| 12 |                 |                           |            |            |            |            |            |            |                      |                 |
| 13 |                 |                           |            |            |            |            |            |            |                      |                 |