

## **Omnitrans Measure I Regional Mobility Partnership Program - Policy Guidelines**

### **1.0 Overview and Program Purpose**

The Omnitrans Measure I Regional Mobility Partnership (RMP) Program provides funding to support the development and sustainability of programs that provide transportation services to seniors and individuals with disabilities throughout the San Bernardino Valley region. The RMP program is Omnitrans implementation of its role as the Consolidated Transportation Services Agency (CTSA) for the San Bernardino Valley. The RMP Program Guidelines have been developed to formalize partnership programs utilizing Measure I<sup>1</sup> funding Omnitrans receives for this purpose.

### **2.0 Program Objectives**

Successful new and continuing RMP programs must align with the following program objectives:

- To provide funding for local, community-based transportation programs which provide service to seniors and individuals with disabilities throughout the San Bernardino Valley
- To allow Omnitrans JPA members, human health and service agencies, local private nonprofit and charitable organizations and other eligible agencies to develop and implement transportation programs for seniors and individuals with disabilities in their community.
- To provide transportation options and mobility programs which compliment rather than duplicate existing services, as well as expand the reach of Omnitrans fixed route and OmniAccess paratransit service.
- To create additional mobility programs which enhance the coordination and efficiencies of transportation services provided throughout the San Bernardino Valley in accordance with the guidance provided by the Public Transit-Human Services Transportation Coordination Plan for San Bernardino County<sup>2</sup>.
- To develop and establish innovative and creative transportation models which improve the delivery of mobility services to seniors and individuals with disabilities in the San Bernardino Valley region.

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<sup>1</sup> Measure I is the half-cent sales tax collected throughout San Bernardino County for transportation improvements. In accordance with the terms stipulated in Measure I, 8% of the generated revenue must be designated to support transportation programs and efforts specifically designed to meet the transportation needs of seniors and individuals with disabilities, with at least 2% of the collected revenue directed to the creation and sustainability of a regional Consolidated Transit Service Agency (CTSA).

<sup>2</sup> This plan, developed by San Bernardino County Transportation Authority (SBCTA), is a unified comprehensive strategy for public transportation service delivery that identifies the transportation needs of individuals with disabilities, older adults, and individuals with limited incomes, and lays out strategies for meeting these needs and prioritizing services.

### **3.0 Program Eligibility Requirements**

Participation in Omnitrans' RMP program is contingent upon maintaining Measure I eligibility.

Eligible RMP applicants include:

- JPA members
- Local governmental agencies
- Human health and service agencies
- Local private nonprofit organizations, and
- Charitable organizations

Eligible RMP programs must:

- serve the demographics identified in the Measure I ordinance
- submit a Service Plan as described in Section 8.0
- enter into a cooperative funding agreement with Omnitrans that defines the conditions of use of the RMP funds
- adhere strictly to the funding and reporting guidelines as outlined in the applicable cooperative service agreements
- address one or more of the unmet transportation needs identified in the Public Transit-Human Services Transportation Coordination Plan for San Bernardino County.

Omnitrans will work with each entity regularly to ensure compliance with Measure I requirements and, rectify any identified issues. A RMP partner that does not continuously meet eligibility requirements will not be able to apply for the simplified renewal process and may have their funding agreement terminated per the conditions of the agreement

### **4.0 Funding Allocation Method & Distribution**

Funding will be distributed to eligible agencies through a competitive Measure I Call for Projects. The method and criteria for agency and project selection are included in the application and instructions package that is distributed as part of the Call for Projects. If the Call for Projects is undersubscribed, Omnitrans may utilize remaining funds in the development and support of new and innovative transportation programs that meet the requirements of the Measure I Guidelines and support the goals of the Coordinated Plan.

Maximum program funding allocations are based on the actual Measure I revenues received by Omnitrans to be used in support of the RMP program. Funding will be distributed in accordance with the distribution method outlined in the cooperative funding agreement between Omnitrans and each agency. All RMP funds must be expended within two years of receipt unless otherwise stipulated in the individually executed cooperative funding

agreements. If the RMP partner seeks to continue the program after two years, this may be using the simplified renewal application (see section 8.2)

In order to apply for continued funding, budgetary increases must remain under that year's Consumer Price Index (CPI). If the budgetary increase surpasses the CPI, program participants would need to apply for a program expansion under the Call for Projects. A panel comprised of Omnitrans, SBCTA, and related staff will review all extension applications and recommend selected programs for awarded, pending Omnitrans' Board approval.

## **5.0 Match Requirements**

### **Operating Funds**

Participating RMP partners must provide a minimum twenty percent (20%) match for total monthly program expenditures and for each invoice submitted. Match funding may be comprised of cash subsidies, fare revenues, donations, agency owned assets or capital, or in-kind contributions such as salaries and benefits for the participating agency employees who perform work on the program. In order to ensure program stability, Omnitrans requires that at least five percent (5%) of total project costs be a cash match which can be comprised of cash subsidies or fare revenue.

### **Capital Funds**

Participating local government authorities and other eligible agencies must provide a minimum ten percent (10%) match of expenditures in total and for each invoice submitted. Match funding may be comprised of cash subsidies, fare revenues, donations, agency owned assets or capital as approved by Omnitrans.

## **6.0 Service Guidelines**

The services provided under the RMP program are available to seniors (aged 62+) and individuals with disabilities. The RMP funds are specified for use in developing transportation programs and mobility options which serve the specified demographics in the San Bernardino Valley.

Participating agencies have discretion in how the transportation service is operated. Transportation and mobility management programs may be operated using direct employees, contract employees, or volunteers.

## **7.0 Driver Training**

Program participants must ensure that its vehicle operators, or its contracted operators, are properly licensed and trained to proficiency to perform essential transportation related duties safely, and in a manner which treats its riders with respect and dignity.

## **8.0 RMP Application Process**

There are different application processes outlined for new RMP programs and for continuing RMP programs. Omnitrans staff will conduct a preliminary review of all applications for completeness and accuracy, request supplemental information for projects that appear to rank well during initial staff evaluations, and present the selected applications to the review panel for final scoring.

### **8.1 New Application (Operating or Capital)**

Project grants are determined through a competitive application process. Local agencies seeking funding must complete a formal application and provide supporting documentation that will be used to fully evaluate the project proposal. An application for any proposed service must include a detailed funding/operations plan.

The project application shall include, at a minimum, the following information:

- Project need, goals, and objectives
- Project development and implementation schedule
- Funding plan (funding needs, match funding availability, operations funding assurances, and ADA considerations, if applicable)
- Proposed operations plan
- Ridership projections
- Any additional information deemed relevant by the applicant

Application will be reviewed by Omnitrans for consistency, accuracy, and concurrence.

### **8.2 Continuing Application**

Current RMP program participants are eligible to apply through a simplified application process for continuing funding. In addition to a completed application, applicants must submit an updated operations and funding plan. If the program is oversubscribed, awards will be limited to funding availability.

#### **8.2.1 Continuing Operating**

Previously awarded participating agencies are eligible to apply for continued operating funding. Program must meet all required program expectancies set forth in the RMP program guidelines and annual operating cost may not increase by more than the prior year's consumer price index (CPI). A continuing program that has a cost greater than the CPI may still be able to continue by applying for an expansion program.

#### **8.2.2 Continuing Capital**

Previously purchased capital assets are eligible to apply for replacement funding through the continuing program application process. Asset must be past their useful life in order to be considered for replacement funding.

### **8.3 Expansion Application**

Current program participants that seek to expand their level of service (i.e. hours of operation, expanded service area, etc.) must apply for funding through our Call for Projects as an “expansion project,” which has the same application process as a “new project”- (see section 8.1.). Applicants can submit the continuing portion of the program through the continuing application process and only the expansion project as two separate applications or as one full new application.

### **9.0 Selection Process**

Specific selection criteria will be used to evaluate program project applications (See Project Evaluation and Scoring Criteria). In order for Omnitrans to consider a project for funding, applicants must submit a fully completed application along with all required supplemental documentation. A separate application package must be completed for each individual project. Multiple variations of the same project will not be considered. A panel comprised of Omnitrans, SBCTA and related staff will review all extension applications and recommend selected programs for award, pending Omnitrans’ Board approval.

### **10.0 Insurance**

Participating agencies shall procure and maintain insurance coverage as specified in the RMP cooperative agreements with Omnitrans. Upon request, participating agencies will provide written certificates evidencing compliance to Omnitrans.

### **11.0 Marketing and Outreach**

Participating agencies shall participate as appropriate in Omnitrans Marketing and outreach efforts to encourage the use of fixed route transit service by seniors and individuals with disabilities.

### **12.0 Recognition of Omnitrans Sponsorship**

Participating agencies shall note Omnitrans sponsorship and the support of Measure I funding in any promotional material for transportation services funded by Omnitrans and shall display an Omnitrans provided decal on vehicles used in this program, excluding taxis and Transportation Network Company vehicles which may be subsidized by program participants. The decal shall be placed at least on passenger and driver side doors.

### **13.0 Vehicle Maintenance**

Program participants shall perform or ensure that a contracted vendor performs maintenance of all vehicles used in the RMP, including but not limited to:

- Daily pre-trip inspections and completion of checklists identifying each vehicle component and system inspected.

- Scheduled preventative maintenance that meets or exceeds the vehicle manufacturer's standards.
- Maintaining maintenance records for each vehicle funded under the RMP for a minimum of five years.
- If required, cooperation in annual motor coach carrier terminal inspections conducted by the California Highway Patrol.

Adherence to this program requirement will be verified each year during an annual site visit conducted by Omnitrans staff (refer to Section 14.0). Vehicle useful life must be tracked and addressed. Vehicles are considered past their useful lives after 5 years or 150,000 miles.

#### **14.0 Eligible Expenses**

Program participants shall ensure that Measure I funds, are used for eligible direct program related expenses which may include contract service providers, staff time, vehicle maintenance, fuel, insurance, vehicle acquisition, program supplies and materials, marketing materials, and community outreach. Additional items may be considered and outlined within individual RMP cooperative agreements. All program expenses are subject to audit. Eligible agencies are responsible for program compliance including, but not limited to operation oversight, reporting, insurance maintenance and monitoring. Administrative overhead costs are not to exceed 5% of the total project expenses.

#### **15.0 Vehicle/Equipment Purchase Requirements**

All vehicles and equipment purchased through the RMP must be new vehicles and/or new equipment. Under special circumstances, Omnitrans at its sole discretion may waive this requirement, however, it is the intention of the program to fund new vehicles/equipment so that the program that the program can fully utilize the useful life of the vehicle/equipment.

#### **16.0 Program Revenue**

Participating agencies must maintain adequate controls for collecting and reporting program revenue, including donations, fees, and cash fares. Program revenue must be used to support the transportation service and may be used as part of the participating agencies' 20 percent local match requirement.

#### **17.0 Reporting**

Participating agencies are required to submit reports using templates provided by Omnitrans. The required metrics may vary and be adjusted dependent upon the nature of the transportation program being operated by the participating agency. Required reporting data will include, but not be limited to, the following:

##### **A. Operational Reports**

- Number of Trips by Category
- Vehicle Service Hours
- Vehicle Service Miles

Operational reports are due no later than thirty (30) days after the end of the service month. Routine failure to submit Operational reports within this timeline may lead to an Agency being ineligible for continuation of the program under the continuing application process.

#### B. Financial Reports

- Program Cost Detail by Expense Category and Percentage of Total Operating Cost
- Fares, Fees and Other Operating Revenue
- Participating and Eligible Agency Total Contribution Source
- Participating and Eligible Agency Share as Percentage of Total Operating Cost
- Cumulative Participating and Eligible Agency Share to Date
- Omnitrans Contribution (RMP Funding)
- Omnitrans Contribution as Percentage of Total Operating Cost

Financial reports are due on a monthly basis not later than thirty (30) days after the end of the month. Financial Summary reports are due on a quarterly basis not later than sixty (60) days after the end of the quarter. Monthly and Quarterly reports must be certified by the participating and eligible agency's Finance Director or Finance Director's financial designee.

Participating agencies shall be required to maintain supporting documentation to substantiate reporting data. Supporting documentation may include, but is not limited to, actual receipts, contractor invoices, trip sheets, payroll, timesheets, fuel logs, and maintenance records/receipts.

Routine failure to submit Financial reports within these timelines may lead to an Agency being ineligible for continuation of the program under the continuing application process.

#### C. Annual Self-Certification and Site Visit Documentation

Participating agencies shall certify their compliance with these Guidelines annually by having their Program Manager or Program Manager's designee sign a completed version of the annual self-certification document and site visit packet provided by Omnitrans. Eligible agencies shall also submit all compliance-related documents requested by Omnitrans. Completed self-certification documents and annual site visit packages must be submitted to Omnitrans within ninety (90) days of the end of the fiscal year.

Failure to meet the established reporting deadlines for any of these reports may result in withholding or loss of future funding.

## **18.0 Audits and Inspection of Records**

Measure I funding is subject to audit. Participating and eligible agencies shall maintain program documentation and records for a period of no less than five years. Program documents and records, including but not limited to payroll, trip sheets, invoices, vehicle maintenance, fuel, and other program-related expenses, shall be available for review by Omnitrans RMP administrators, auditors, and authorized agents upon request. Participating and eligible agencies must follow established accounting requirements and applicable laws regarding the use of public funds. Failure to submit to an audit in a timely manner may result in withholding or loss of future funding. Failure to comply with the approved Service Plan may impact program eligibility and may require remediation including repayment of funds and/or reduction in overall allocation.

Audits shall be conducted by Omnitrans, or other authorized agent, as determined by Omnitrans.