

# SFMTA Powered Scooter Share Application Evaluation Scoresheet

## 1. Initial Screening

Staff will review each application for initial determinations on responsiveness and acceptability in an Initial Screening process. Applicants must answer all questions in the application. If a question is not applicable, state N/A. Applications are not scored during the Initial Screening process. Initial Screening is simply a pass/fail determination as to whether an application meets all threshold requirements. Elements subject to review during Initial Screening include, without limitation: application completeness, compliance with format requirements, compliance with pass/fail minimum qualification requirements, and responsiveness to the material terms and conditions of the Permit Requirements. SFMTA staff reserve the right to request clarification from applicants prior to rejecting an application for failure to meet the Initial Screening requirements. Clarifications are limited exchanges between the SFMTA and an applicant for the purpose of clarifying certain aspects of the application, and will not provide an applicant the opportunity to revise or modify its application. Applications that pass the Initial Screening process will proceed to the evaluation process described below.

Initial Screening	Pass
Application Completeness Submitted application is completed in its entirety.	
Pass/Fail Requirements Applications must clearly demonstrate compliance with the following specified pass/fail requirements indicated in a blue box in the application: <input type="checkbox"/> A1, <input type="checkbox"/> A2, <input type="checkbox"/> A5a, <input type="checkbox"/> A6a, <input type="checkbox"/> E3, <input type="checkbox"/> E3a, <input type="checkbox"/> I2, <input type="checkbox"/> J, <input type="checkbox"/> K1, <input type="checkbox"/> K2, <input type="checkbox"/> L, <input type="checkbox"/> M	
Application Formatting Compliance with page limits and other formatting requirements in Permit Application	
Permittee Signature Page Applicant's signature accepting all permit terms and conditions.	
Responsiveness to Material Terms and Conditions Application demonstrates responsiveness to material permit terms and conditions as specified in Appendix A.	
Sample Scooters One sample scooter of each model to be included in the fleet at service launch received by SFMTA, including adaptive models.	

## 2. Evaluation Process - Application Review & Scoring

Permit Applications will be scored according to this Evaluation Scoresheet to determine which applicants qualify for a permit. Only items listed below will be scored. Scored evaluation criteria primarily reflect questions from the Permit Application. While scoring guidance is given for certain criteria indicating proposal content that will receive higher scores, this guidance is not intended to be exhaustive; applicants that propose other methods that the SFMTA concludes will address the issue(s) at hand may also receive higher scores. Note that for a given scored element, if the applicant wishes to refer reviewers to another section of the application, they must refer to the section by question number (e.g. A.1.) and page number in the applicant's application. Information from other sections that is not referenced in this manner will not be considered.

Criteria will be scored using the following rubric. Applicants must receive an average score of 2 or greater for each section, or will be disqualified from further evaluation.

- "1" ratings will be given to responses that include the least compelling solutions, demonstrating the minimum level of commitment and ability to solving known challenges and concerns and meeting the minimum requirements.
- "2" ratings will be given to responses that include ordinary or typical, but unexceptional solutions, demonstrating a moderate level of commitment and ability to solving known challenges and concerns and exceeding the minimum requirements.
- "3" ratings will be given to responses that include significantly more detailed approaches demonstrating a higher level of commitment and ability to solving known challenges and concerns, and substantially exceeding the minimum requirements.
- "4" ratings will be given to responses that include robust, unique or innovative approaches demonstrating the highest level of commitment and ability to solving known challenges and concerns, and exceeding the minimum requirements to the highest degree.

Scored criteria will then be summed for each section. Each application section will be given the following weight: Section A (10%), B (10%), C (15%), D (10%), E (20%), F(5%), G (15%), H (5%), I (10%)

Overall application scores will be calculated based on these percentages.

A. Device Standards and Safety Assurances (10%)	1 (least robust plan)	2	3	4 (most robust plan)
3. Commitments applicant makes to ensure that devices are safe for operation, including plan to address safety issues with device(s), either with a specific device or fleet-wide.				
4. Commitments to encourage users to wear a helmet while riding. <i>Higher scores will be given to applicants that propose a means of providing a helmet with every ride.</i>				
<b>Seated Scooters</b>				
5. Proposed seated device type				
5b. Stepover height of either floorboard or frame for seated scooters. Devices with a stepover height no higher than 12 inches from the ground for either the floorboard or frame that facilitates ease of access when mounting vehicle will receive higher scores.				
5c. Wheel size for seated scooters. Devices with wheel diameters of over 12 inches will the receive the highest score.				
5d. Purpose built seated device for seated scooters. Purpose built seated devices are defined as devices that include a seat that is part of the original manufacturing process, not an additional aftermarket component remedially appended onto the device shall receive a higher score.				
<b>Standing Scooters</b>				
6. Proposed standing device type				
6b. Stepover height of either floorboard or frame for standing scooters. Devices with a stepover height no higher than 12 inches from the ground for either the floorboard or frame that facilitates ease of access when mounting vehicle will receive higher scores.				
6c. Wheel size for standing scooters. Devices with wheel diameters of over 12 inches will the receive the highest score.				

B. Pricing Structure (10%)	1 (least robust plan)	2	3	4 (most robust plan)
1. Low-income customer plan and cash payment option, and commitment to expanding affordable access				
2. Other discounted customer plans				
3. Plan for promoting the low-income user plan, and strategy for achieving the goal of one low-income plan member for every two scooters authorized. <i>Higher scores will be given to applicants that demonstrate a strong commitment to expanding affordable access, for example by promoting low-income plans in-app or upon user sign up.</i>				
5. Plan for offering service to users without a smart phone				
6. Strategy to employ other pricing incentives or variable rates, including those that address issues such as overconcentration of scooters in certain areas or at certain locations by incentivizing users to re-locate such scooters to less crowded areas				
7. Billing and customer service business rules for lost scooters				

C. Operations Plan (15%)	1 (least robust plan)	2	3	4 (most robust plan)
<b>Rebalancing &amp; Operations Plans</b>				
1. Hours of operation. <i>Higher scores will be given to applicants that propose a higher number of operating hours that scooters are available.</i>				
2. <b>Plan to ensure that at least 5% of applicant's on-street fleet includes seated devices. Applicants that commit to providing more than 25% of seated devices will be scored higher for this section.</b>				
<b>Distribution Strategy</b>				
4. <b>Operational plan to meet the SFMTA's Distribution Guidelines and Requirements as detailed in Appendix 4 of the attached Permit Terms and Conditions, including the Fleet Deployment Threshold, the Key Neighborhood Service Coverage, and the Downtown Cap.</b>				
5. Methods for deploying and redistributing scooters consistent with Distribution Guidelines and Requirements, Appendix 4				

6. Proposed methods for avoiding overcrowding of scooters in high demand area(s). <i>Higher scores will be given to applicants that commit to methods to respond to this issue, such as staffed scooter valet services at high-demand locations like transit stations, Fisherman’s Wharf, etc.. Higher scores will also be given to applicants that propose other methods that the SFMTA concludes will address this issue.</i>				
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D. Adaptive Scooter Plan (10%)	1 (least robust plan)	2	3	4 (most robust plan)
1a. Proposed adaptive device types				
1b. Program drop-off and pick-up hours, rental time periods, and plan to ensure responsiveness to rental requests.				
1c. Price structure for Adaptive Scooters. Higher scores will be given to applicants that commit to offering free rentals for Adaptive Scooters.				
1d. Plan to accept on-line rental requests				
1e. Plan to ensure that rental requests are responded to within 24-hours.				
1f. Plan for outreach and marketing of the Adaptive Scooter Program during the permit term, including how the feedback and perspectives of members of the disability community will continuously be incorporated into the Adaptive Scooter Program.				
1g. Plan for reporting data monthly to the SFMTA, pursuant to Data Reporting Guidelines and Requirements, Appendix 3.				

E. Plan for Safe Scooter Riding & Parking (20%)	1 (least robust plan)	2	3	4 (most robust plan)
Safe Riding Measures				
1. Robustness of education and training to ensure legal operation of scooters, and safety of users and those around them. <i>Higher scores will be given to applicants that propose any of the following: 1) a mandatory video that expressly instructs riders where they can and cannot ride; 2) a pop-up reminder every time a user opens the app that riding on the sidewalk is illegal; and/or 3) commitment to share educational materials on this topic at all outreach community events that the Permittee participates in or sponsors. Higher points will be given cumulatively for each component proposed noted above.</i>				
2. <b>Plan to limit speeds (for example, on a user’s first ride to allow new users learn to operate devices at a slower speed, in certain geographic areas or locations.)</b>				
3. Commitment(s) to educate users on how to report a collision or other safety incident to applicant and appropriate authorities				
Safe Parking Measures				
4. Commitments to convey information about proper parking to users on the mobile application and/or on the scooters, including detailed educational tools and reminders				
5. Incentive programs applicant will implement to encourage riders to properly park scooters at bike racks or to the <b>specifications described in the SFMTA’s Mobility Device Parking Requirements and General Path of Travel Guidelines, Appendix 1</b> , including review of photographic records of proper parking, and rewards programs for consistent good parking behavior. <i>Higher scores will be given to applicants that commit to collection and review of photographic records of parking at the end of each ride, and also to those that commit to rewards programs for consistent good parking behavior.</i>				
6. Quality of locking mechanism(s) to be deployed upon program launch that will allow scooters to be secured to fixed objects as specified in Mobility Device Parking Requirements and General Path of Travel Guidelines, Appendix 1				

7. Plan to display bike rack locations in app. <i>Higher scores will be given to applicants that propose plans which utilize and build upon SFMTA's publicly-available bike parking data, including through methods such as crowdsourcing rack locations. Crowdsourcing could include allowing users to submit photos and locations of bike racks to the permittee for inclusion in the app.</i>				
Accountability Measures				
8. Rider accountability measures applicant commits to implementing, including commitment to monitoring compliance with applicable laws and regulations, such as those prohibiting riding on the sidewalk or improper parking, including any additional technology innovations beyond those required in the San Francisco Transportation Code.				
8.a. Mechanisms to hold riders accountable for repeated improper, unsafe and/or illegal parking or riding, such as an escalating penalty structure, progressive disciplinary process, information sharing with other operators regarding riders with repeated problematic riding and/or parking behaviors. Higher scores will be given to applicants who propose escalating consequences for repeat problematic behaviors (for example warnings for first offenses, fines for second offenses, and suspensions for third offenses).				
9. Investigation and resolution process regarding complaints about improper, unsafe, or illegal riding/parking behavior.				
10. Any additional scooter modifications, notification systems, infrastructure, etc. not otherwise mentioned in this application that further ensures safe scooter riding and/or parking.				
11. Procedures for noncustomers to notify the company through phone, app, website, or email, if there is an improperly parked scooter, along with how you will respond to an track these complaints.				
12. <b>Commitments to ensure customers have a valid driver's license, and notification process for registered users who do not have licenses.</b> <i>Higher scores will be given to applicants that provide examples of successful implementation of these strategies in San Francisco and/or other cities.</i>				

F. Recharging, Maintenance, Cleaning, and Sustainability Plan (5%)	1 (least robust plan)	2	3	4 (most robust plan)
Recharging, Maintenance, & Cleaning				
1.b. Description of how staff, company employees, staff from staffing agencies, and/or independent contractors will know when a scooter needs to be recharged, and any information and training applicant will provide concerning safe charging practices				
1.c. Plans to educate and train company employees, staffing agency staff, and/or independent contractors on safe and legal parking when retrieving scooters for recharging, rebalancing, or maintenance				
1.d. Commitments to minimize potential negative impacts (e.g. congestion, double parking, excessive vehicle-miles traveled) associated with practices related to collecting, redistributing, and recharging scooters				
1.e. Plan to document and report upon request to the SFMTA on non-revenue vehicle miles traveled (VMT), and the number and length of trips generated by collecting, redistributing, and charging activities.				
2. Approach to maintenance, cleaning, repair of scooters, safety check protocols, and minimum standards for repair and cleaning. Include how you will train staff, including employees, staff from staffing agencies, and/or independent contractors, to execute your approach.				
3. Procedures for customers to notify the company that there is a safety or maintenance issue with a scooter, and procedures for removing that scooter from service until it is inspected.				
4. <b>Compliance with the City's Zero Waste and Producer Responsibility policies and San Francisco Fire Code §325,</b> including taking responsibility for the scooters throughout their life cycles by properly managing hazardous components including batteries, storage of defective/old batteries, reducing the need for new scooters through repair, redistributing for reuse, and recycling or otherwise properly disposing of all component parts, consistent with the Sustainability Guidelines and Requirements.				
Sustainability				
5. Commitments to ensure scooters do not defile the environment, including commitments to respond to reports that a scooter is in the bay or another body of water				

G. Hiring and Labor Plan (15%)	1 (least robust plan)	2	3	4 (most robust plan)
2. Employment types, whether independent contractors, staffing agency staff, or employees, for maintenance/operations staff. <i>The highest scores will be given to applicants that commit to employing only company-hired employees. Scores for applicants that use a mix of types of staff, including employees, staff from staffing agencies, and/or independent contractors will be proportionate to the percentage of each type of staff in the plan based on the following: higher scores will be given to applicants that plan to utilize a higher percentage of employees, the next highest scores will be given to the plans with a higher percentage of staffing agencies staff, and lower scores will be given based on the higher percentage of independent contractors in the plan.</i>				
3. Plan complies with best practices regarding equal opportunity, local hiring, and fair wages. <i>Higher scores will be given to applicants that commit to utilizing the City's First Source Hiring Program, as applicable, and coordinating with other community-based organization hiring programs as appropriate, in order to encourage direct employment of qualified and economically disadvantaged San Franciscans through the City's numerous community workforce partners.</i>				
4. Skills and training procedures for field/operations staff and contractors				
5. Robustness of labor harmony plan as it relates to consistent distribution, operation and maintenance (including steps taken to avoid potential service disruptions), and information regarding employee work hours, working conditions, and wages				

H. Community Engagement Plan (5%)	1 (least robust plan)	2	3	4 (most robust plan)
1. Equitable community engagement				
2. Communication strategy				
3. Multilingual communications services				
4. Accessibility and disability community needs				
5. Community engagement record				
6. Scooter safety training				

I. Experience and Qualifications (10%)	1 (least experience)	2	3	4 (most experience)
3.a. Population and population density of cities listed in I2. <i>Higher scores will be given to applicants that list more cities with a population of at least 75,000 and a population density of at least 10,000 people per square mile.</i>				
3.c. Average daily active fleet size in latest six months of operation for cities listed in I2. <i>Higher scores will be given to applicants that have operated a greater number of fleets of at least 500 scooters, and will increase proportionally with larger deployed fleets.</i>				
3.d. Length of operation for fleets of 500 scooters or more for cities listed in I2. <i>Higher scores will be given to applicants that operated 500 scooters or more in more cities for longer periods (six months or greater).</i>				
3.e. Successful deployment of a lock-to system in cities listed in I2. <i>Higher scores will be given to applicants that have successfully deployed a lock-to system in a greater number of cities.</i>				
3.f. On-time payment of applicable permit fees in cities listed in I2				
3.g. Five most recent, serious suspensions, penalties, citations and/or warnings received from a local authority in which applicant operated, even if the city is not one of the cities listed in I2. Include what the alleged violation was for, when applicant received it, in which city it was received, and whether or how the alleged violation was resolved. <i>Higher scores will be given proportionally to applicants with a smaller number of serious violations, i.e. less or no suspensions, minor violations.</i>				