

# 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. 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, 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.

Required Submission	Pass
<b>Application Completeness</b> Submitted application is completed in its entirety.	
<b>Application Formatting</b> Compliance with page limits and other formatting requirements in Permit Application: Section C (2 pages), Sec. D (5, not including Adaptive Scooter Pilot Plan), Sec. E (4), Sec. F (3), Sec. G (3), Sec. H (6), Sec. J (2).	
<b>Permittee Signature Page</b> Applicant's signature accepting all permit terms and conditions.	
<b>Responsiveness to Material Terms and Conditions</b> Application demonstrates responsiveness to material permit terms and conditions as specified in Appendix A.	
<b>Device Standards &amp; Safety Assurances</b> As per Section A 1 and 2: Proof of UL 2271 and 2272 battery certifications from the manufacturer. Test results from a qualified independent lab demonstrating that each model scooter put into service meets or exceeds California Vehicle Code §21223.	
<b>Sample Scooters</b> As per Section B: Two sample scooters received by SFMTA. Scooters comply with Appendix A Device Requirements.	
<b>Mandatory Plan Components</b> All required plans are complete per Permit Application specifications. <ul style="list-style-type: none"> <li>C. Pricing Description (including Low-Income Membership Plan(s))</li> <li>D. Operations Plan</li> <li>E. Plan for Safe Scooter Riding &amp; Parking</li> <li>F. Recharging, Maintenance, Cleaning, and Sustainability Plan</li> <li>G. Hiring and Labor Plan (including Labor Harmony Plan)</li> <li>H. Community Engagement Plan</li> </ul>	
<b>Additional Plan Components</b> If independent contractors will be used, application includes all relevant requested information under Section F 1(a), 1(b), and Section G 2, 2(a), and 4.	
<b>Data Protocols, Privacy, &amp; Accountability</b> Verification of data-sharing protocols as per Section I. Privacy policies, user agreements, terms of service, etc. as listed under Section K.	
<b>Images &amp; Descriptions</b> Images & descriptions of scooter devices and mobile application as per Sections L and M.	
<b>Proof of Insurance</b> Certificate of insurance and endorsement of additional insured, or statement of intent to obtain this insurance in advance of being issued a permit, received by application submission deadline as per Section N.	

## 2. Evaluation Process - Application Review & Scoring

Permit Applications will be scored according to the Evaluation Scoresheet to determine which applicants qualify for a permit. Scored evaluation criteria primarily reflect questions from the Permit Application. Applicants can find more details on evaluation criteria in the accompanying Community Engagement Guidelines and Requirements, Data Reporting Guidelines and Requirements, Distribution Guidelines and Requirements, and Sustainability Guidelines and Requirements.

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 rudimentary 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 basic or typical, but unexceptional solutions, demonstrating a moderate level of commitment and ability to solving known challenges and concerns and meeting 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 significantly 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 substantially exceeding the minimum requirements.

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

Overall application scores will be calculated based on these percentages.

A. Device Standards and Safety Assurances (5%)	1 (least robust plan)	2	3	4 (most robust plan)
3. Commitments applicant makes to ensure that devices are safe for operation, and what applicant commits to do if a safety issue with device(s) is discovered				
C. Pricing Structure (10%)	1 (least robust plan)	2	3	4 (most robust plan)
1. Quality of low-income customer plan, and commitment to expanding affordable access				
2. Quality of other discounted customer plans				
3. Plan for achieving the goal of one low-income plan member for every five scooters authorized				
4. Proposed rates, including any membership plans				
5. Cash payment options				
6. Plan for offering service to users without a smart phone				
7. Strategy to employ variable rates (or other incentives) based on trip duration to prioritize short term trips, maximize fleet availability, and discourage overconcentration of scooters in the downtown core				
8. Billing and customer service business rules for lost scooters				
9. Plan for offering incentives for trips starting or ending along key transit lines or at transit hubs, including how applicant plans to advertise any incentives to users				
10. Plan for promoting the low-income user plan				
D. Operations Plan (10%)	1 (least robust plan)	2	3	4 (most robust plan)
<b>Rebalancing &amp; Operations Plans</b>				
1. Hours of operation				
2. Storage of scooters during non-operational hours				
8. Staffing and operations plan sufficient for scale of proposed operations				
9. Plan for proper scooter parking				
11. Commitments to modifying operations in response to a major transit issue				
<b>Distribution Strategy</b>				
5. Methods for deploying and redistributing scooters consistent with Distribution Guidelines and Requirements				
6. Proposed methods for avoiding overcrowding of scooters in high demand area(s)				
<b>Equitable Operations</b>				
3. Service to Key Neighborhoods, as defined in the Distribution Guidelines and Requirements				
4. Service to neighborhoods without existing powered scooter share service				
7. Robustness of proposed Adaptive Scooter Pilot Plan, including proposed fleet size and service area, outreach plan to collaborate with disability rights organizations, and timeline and description of how applicant will strive to expand access to people with disabilities				

E. Plan for Safe Scooter Riding & Parking (20%)	1 (least robust plan)	2	3	4 (most robust plan)
<b>Rider Safety Measures</b>				
1.a. Robustness of education, incentives, training, scooter modifications, notification systems, infrastructure, etc. that you commit to implementing to ensure legal operation of scooters, and safety of users and those around them				
1.b. Commitments to conveying information about proper parking to users on the mobile application and/or on the scooters, including detailed educational tools and reminders				
1.c. Incentive programs applicant will implement to encourage riders to properly park scooters at bike racks or to the specifications described in the SFMTA's Powered Scooter Parking Requirements and General Guidelines (Appendix 1), including review of photographic records of proper parking, and rewards programs for consistent good parking behavior				
1.d. Description of any fines or consequences for users who improperly park their scooters - including punitive measures like warnings or suspension of service - that you commit to issuing for patterns of bad parking behavior				
1.e. Rider accountability measures you commit to implementing, and how you commit to monitoring compliance with applicable laws and regulations, including any penalties and/or technology innovations that allow monitoring, and what commitments you make to address noncompliant users				
3. Description of commitments to ensure customers have a valid driver's license, and notification process for registered users who do not have licenses				
4. Describe commitments to ensure that users wear a helmet while riding, including device innovations that make a helmet available as part of each rental				
7. Describe how you commit to educate users on how to report a collision or other safety incident to you and appropriate authorities, including an option to report these issues at the end of every ride				
<b>Operator Accountability Measures</b>				
1.f. Description of safety complaint investigation and resolution process				
1.g. Additional measures you will phase in if initial approach does not achieve desired compliance				
2. Quality of locking mechanism(s) to be deployed upon program launch that will allow scooters to be secured to fixed objects as specified in Appendix 1				
5. Description of procedures for noncustomers to notify the company through phone, app, website, or email, if there is an improperly parked scooter, along with operator's response procedures, and commitments to logging complaints in the shared complaints database described in Appendix A #29				
6. Description of procedures for responding to an identified problem of consistent over-concentration of scooters at a specific location, including operational measures like scooter valet, or incentive programs to re-locate such scooters to less crowded areas				
<b>F. Recharging, Maintenance, Cleaning, and Sustainability Plan (10%)</b>				
1 (least robust plan)	2	3	4 (most robust plan)	
<b>Recharging, Maintenance, &amp; Cleaning</b>				
1.a. Description of how staff and/or independent contractors will know when a scooter needs to be recharged, and any information and training you will provide concerning safe charging practices				
1.b. Description of plans to educate and train staff and/or independent contractors on safe and legal scooter parking when retrieving scooters for recharging, rebalancing, or maintenance				
1.c. Description of commitments to minimize potential negative impacts associated with practices related to collecting, redistributing, and recharging scooters				
3. Description of approach to maintenance, cleaning, and repair of scooters, safety check protocols, and minimum standards for repair and cleaning				
4. Describe 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				
<b>Zero Waste &amp; Producer Responsibility</b>				
5. Description of how applicant will comply with the City's Zero Waste and Producer Responsibility policies, including properly managing hazardous components such as batteries, reducing the need for new scooters through repair, redistributing for reuse, recycling, and otherwise properly disposing of all component parts				
6. 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				

<b>Accountability</b>				
1.d. Description of plan to document and report to the SFMTA on new non-revenue vehicle miles traveled (VMT), and number and length of trips generated by collecting, redistributing and charging activities				
1.d.i. Description of plan to provide the SFMTA with this data by vehicle type and/or average fuel efficiency				
2. Life-cycle analysis (LCA) of scooter model(s) to be deployed, including life expectancy of component parts, or description of plan to provide the SFMTA with an LCA within 6 months of permit issuance				
<b>G. Hiring and Labor Plan (10%)</b>	<b>1 (least robust plan)</b>	<b>2</b>	<b>3</b>	<b>4 (most robust plan)</b>
1. Robustness of staffing plan, including hired staff and contractors, for operation and maintenance of your Powered Scooter Share program				
2. Employment standards, whether independent contractors or full-time employees				
3. Plan complies with best practices regarding equal opportunity, local hiring, and fair wages				
5. Skills and training procedures for staff and contractors				
6. 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				
<b>H. Community Engagement Plan (15%)</b>	<b>1 (least robust plan)</b>	<b>2</b>	<b>3</b>	<b>4 (most robust plan)</b>
Plan complies with SFMTA's Community Engagement Plan Requirements				
Communications strategy will be routinely updated upon any service change related to pricing, service area, devices, membership programs, or operations				
A community engagement staffing plan, including key staff with relevant experience, specifically dedicated to community engagement				
A culturally sensitive marketing plan tailored to neighborhoods within the service area				
Number of partnering organizations				
Geographic distribution of partnering organizations				
<b>Partner-ready programs with established process, dedicated staff, and proper resources:</b>				
• For local hiring				
• To work with community based organizations				
• To offer scooter safety courses				
• To offer culture and arts opportunities				
• For local small business promotional opportunities				
<b>J. Experience and Qualifications (20%)</b>	<b>1 (least experience)</b>	<b>2</b>	<b>3</b>	<b>4 (most experience)</b>
1. Qualifications to operate a Powered Scooter Share Program				
2. Comprehensive experience operating a Powered Scooter Share Program in San Francisco and/or other similarly dense, urban North American cities. <i>General scoring guidance: Higher scores will be given for applications with verifiable experience reliably operating permitted (if applicable) systems of at least 500 scooters. Applicants with experience in greater numbers of similarly dense, urban North American cities will also receive higher scores. Lower scores will be given for high numbers of citations from local authorities or citations that were not paid on time, services that were suspended, services that were operated without a permit from the applicable agency, and/or if the applicant has been found to have misrepresented their experience based on verification with the reference/point of contact, and/or if the reference/point of contact is not a relevant city/municipal representative.</i>				