

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 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.

Required Submission	Pass
<p>Application Completeness Submitted application is completed in its entirety.</p>	
<p>Application Formatting Compliance with page limits and other formatting requirements in Permit Application: Section C (2 pages), Sec. D (6), Sec. E (2)(Optional), Sec. F (6), Sec. G (3), Sec. H (3), Sec. I (6) Sec. J (2).</p>	
<p>Permittee Signature Page Applicant's signature accepting all permit terms and conditions.</p>	
<p>Responsiveness to Material Terms and Conditions Application demonstrates responsiveness to material permit terms and conditions as specified in Appendix A.</p>	
<p>Device Standards & Safety Assurances 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.</p>	
<p>Sample Scooters As per Section B: One sample scooter of each model to be included in the fleet at service launch received by SFMTA, including adaptive models. Scooters comply with Appendix A Device Requirements.</p>	
<p>Mandatory Plan Components All required plans are complete per Permit Application specifications. C. Pricing Description (including Low-Income Membership Plan(s)) D. Operations Plan F. Plan for Safe Scooter Riding & Parking G. Recharging, Maintenance, Cleaning, and Sustainability Plan H. Hiring and Labor Plan (including Labor Harmony Plan) I. Community Engagement Plan</p>	
<p>Minimum Qualifications Applications must clearly demonstrate compliance with the following specified minimum qualifications indicated in bold in the application (Sections A(3); F (3)(a), (8)(a); H(1); I(1),(2),(7),(8); and J (2)).</p>	
<p>Additional Plan Components If independent contractors will be used, application includes all relevant requested information under Section G 1(a), 1(b), and Section H 2, 2(a), and 4.</p>	
<p>Data Protocols, Privacy, & Accountability Verification of data-sharing protocols as per Section K. Privacy policies, user agreements, terms of service, etc. as listed under Section L.</p>	
<p>Images & Descriptions Images & descriptions of scooter devices and mobile application as per Sections M and N.</p>	
<p>Proof of Insurance 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 O.</p>	

2. Evaluation Process - Application Review & Scoring

Permit Applications will be scored according to the 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. Applicants can find more details on evaluation criteria in the accompanying Mobility Device Parking Requirements and General Guidelines, Community Engagement Guidelines and Requirements, Data Reporting Guidelines and Requirements, Distribution Guidelines and Requirements, and Sustainability Guidelines and Requirements. 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 criteria, 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 in that criteria's score.

Criteria will be scored using the following rubric. Applicants must receive an average score of 2 or greater for each section (except Section E which is optional), 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 (5%), C (10%), D (10%), E (5%, optional), F (25%), G (10%), H (15%), I (10%), J (10%)
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)
4. 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 (either with a specific device or fleet-wide)				
5. Commitments to encourage that users 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>				
C. Pricing Structure (10%)	1 (least robust plan)	2	3	4 (most robust plan)
1. Quality of low-income customer plan and cash payment option, and commitment to expanding affordable access				
2. Quality of 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				

D. Operations Plan (10%)	1 (least robust plan)	2	3	4 (most robust plan)
Rebalancing & Operations Plans				
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. Description of Adaptive Scooter device type and what percentage of the fleet applicant commits to including as part of total fleet, including information on the selection and/or development of the device and demonstration of how input and feedback from people with disabilities was incorporated				
7. Description of experience providing service during the COVID-19 pandemic in San Francisco or other cities and how applicant commits to contributing to San Francisco's Transportation Recovery Plan				
Distribution Strategy				
5. Methods for deploying and redistributing scooters, including Adaptive Scooters, consistent with Distribution Guidelines and Requirements				
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>				
Equitable Operations				
4. Service to Key Neighborhoods, as defined in the Distribution Guidelines and Requirements				
Data Sharing				
8. Description of applicant's ability and timeline to support the Mobility Data Specification (MDS) version 1.0 and, when adopted, 1.1. Additionally, describe your company's ability and timeline to implement the Reports endpoint under the Provider API in v1.1 of MDS, including the addition of adaptive scooters as a special group type. <i>The highest scores will be given to applicants that:</i> a) <i>commit to supporting version 1.0</i> b) <i>propose the shortest implementation timeline for version 1.0</i> c) <i>commit to supporting version 1.1</i> d) <i>propose the shortest implementation timeline for version 1.1</i> e) <i>commit to implementing the Reports endpoint in version 1.1, including the addition of adaptive scooters as a special_group_type</i> <i>Proportionally lower scores will be given cumulatively to applicants for not meeting (a), (c), and/or (e), and/or for proposing longer implementation timelines for (b) and/or (d). The lowest scores will be given to applicants that do not commit to (a) and (c).</i>				
E. Complementary Adaptive Scooter Plan (5%) (Optional)				
1. Proposed adaptive device type(s)				
2. Proposed adaptive service model(s), including service area, program eligibility, pricing structure, and reservation/request process				
3. Description of community engagement on the Complementary Adaptive Scooter Plan conducted to date				
4. Plan for continued outreach and marketing during program, including how the feedback and perspectives of members of the disability community will continuously be incorporated into Complementary Adaptive Scooter Plan. <i>Note: this item concerns outreach and engagement for the Complementary Adaptive Plan only and will be scored separately from the outreach and engagement for the mandatory Adaptive Scooters in Section D.</i>				
5. Plan for data sharing and Complementary Adaptive Scooter program evaluation framework, including whether data will be reported manually or whether devices will be MDS-enabled. <i>Higher scores will be given for applicants that propose using MDS-enabled devices, and to applicants that explain how they will use ongoing evaluation methods (such as surveys) to improve their Complementary Adaptive Scooter program.</i>				

F. Plan for Safe Scooter Riding & Parking (25%)	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. Description of 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, or if a user is detected as riding on the sidewalk, etc.)				
3. Description of commitment(s) to educate users on how to report a collision or other safety incident to you and appropriate authorities				
Safe Parking Measures				
4. Commitments to conveying 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 specifications described in the SFMTA's Mobility Device Parking Requirements and General Guidelines (Appendix 1), 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 Appendix 1				
7. Description of 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 you commit to implementing, and how you commit to monitoring compliance with applicable laws and regulations, such as those prohibiting riding on the sidewalk or proper parking, including any technology innovations that allow monitoring, and what commitments you make to address noncompliant users.				
8.b. Description of how your escalating penalty structure will hold riders accountable specifically for unsafe and/or illegal riding behavior. <i>Higher scores will be given to applicants who propose escalating consequences for repeat offenders (for example warnings for first offenses, fines for second offenses, and suspensions for third offenses).</i>				
8.c. Description of how your escalating penalty structure will hold riders accountable specifically for improper parking. <i>Higher scores will be given to applicants who propose escalating consequences for repeat offenders (for example warnings for first offenses, fines for second offenses, and suspensions for third offenses).</i>				
9. Description of investigation and resolution process regarding complaints about improper, unsafe, or illegal riding/parking behavior.				
10. Description of any additional scooter modifications, notification systems, infrastructure, etc. not otherwise mentioned in this application that further ensures safe scooter riding and/or parking.				
11. 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 #27				
12. Description of commitments to ensure customers have a valid driver's license, and notification process for registered users who do not have licenses. <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>				

G. Recharging, Maintenance, Cleaning, and Sustainability Plan (10%)	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 you will provide concerning safe charging practices				
1.c. Description of 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. Description of 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				
3. Description of approach to maintenance, cleaning, and repair of scooters, safety check protocols, and minimum standards for repair and cleaning, including COVID-19-specific cleaning measures				
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				
Sustainability				
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				
Accountability				
1.e. 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.e.i. Description of plan to provide the SFMTA with this data by vehicle type and/or average fuel efficiency				
H. Hiring and Labor Plan (15%)				
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>				
5. Skills and training procedures for field/operations 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				

I. Community Engagement Plan (10%)	1 (least robust plan)	2	3	4 (most robust plan)
3. Communications strategy for service changes				
4. Online community feedback forum				
5. Disability community outreach and engagement strategy for the overall program				
6. Outreach strategy for stakeholders beyond current users or the target market				
9. Cultural sensitivity				
Inclusive Partnerships and Programs				
10.a. Partnerships and detailed programs for local hiring				
10.b. Partnerships and detailed programs to work with Community-Based Organizations and affordable housing developers				
10.c. Partnerships and detailed programs to offer scooter safety courses				
10.d. Partnerships and detailed programs to offer culture and arts opportunities				
10e. Partnerships and detailed programs for local small business promotional opportunities				
J. Experience and Qualifications (10%)	1 (least experience)	2	3	4 (most experience)
3.a. Population and population density of cities listed in J2. <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 J2. <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 J2. <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 J2. <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 J2				
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 J2. 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>				