

## San Bernardino County Transportation Authority (SBCTA) Vanpool Program Guidelines

### SBCTA VANPOOL PROGRAM REQUIREMENTS:

1. **Eligibility Requirements.** A Vanpool consists of a qualifying number of passengers commuting in a 7 to 15 passenger van that travels on a regular basis to and from work and/or vocational/post-secondary education destination (referred throughout as a “worksite”). To qualify and apply to the SBCTA Vanpool Program, the vanpool must meet ALL of the following requirements (explained in further detail throughout these Guidelines):
  - i. The applicant to the SBCTA Vanpool Program must be the vanpool’s Leaseholder - i.e., the person entering the lease agreement with a vanpool leasing vehicle vendor (Vendor);
  - ii. The vanpool must be used for commuting purposes to and from a regular work and/or vocational/post-secondary education destination;
  - iii. The driver of the vanpool must be a volunteer and a participant in the Vanpool Program;
  - iv. Van must be leased through a SBCTA-approved vehicle Vendor;
  - v. Minimum occupancy must be 70% or higher at startup and maintained at 70% or higher on a monthly basis;
  - vi. One way miles from where the van is parked at night to where the van is parked at the regular work site must be at least 15 miles;
  - vii. Trip must either begin or end its commute within the SBCTA service area.
  
2. **SBCTA Vanpool Service Area.** The origin or the destination of the vanpool must be within the SBCTA service area - which is defined as the geographic boundaries of the Cities and surrounding communities in the:
  - i. **San Bernardino Valley:** Cities of Chino, Chino Hills, Colton, Fontana, Grand Terrace, Highland, Loma Linda, Montclair, Ontario, Rancho Cucamonga, Redlands, Rialto, San Bernardino, Upland and Yucaipa;
  - ii. **Mountain Communities:** City of Big Bear Lake;
  - iii. **Morongo Basin:** Town of Yucca Valley and City of Twentynine Palms;
  - iv. **Colorado Basin:** City of Needles.

Therefore, to qualify and be considered for participation in the Vanpool Program, either the origin OR the destination must be in one of the following zip codes:

92305	Angelus Oaks	92242	Earp
92314	Big Bear City	92335	Fontana
92315	Big Bear Lake	92336	Fontana
92316	Bloomington	92337	Fontana
92318	Bryn Mawr	92339	Forest Falls
91708	Chino	92313	Grand Terrace
91710	Chino	92346	Highland
91709	Chino Hills	92252	Joshua Tree

92285	Landers	92376	Rialto
92354	Loma Linda	92377	Rialto
92350	Loma Linda	92401	San Bernardino
92357	Loma Linda	92403	San Bernardino
92358	Lytle Creek	92404	San Bernardino
92359	Mentone	92405	San Bernardino
91763	Montclair	92407	San Bernardino
92256	Morongo Valley	92408	San Bernardino
91759	Mt Baldy	92410	San Bernardino
92363	Needles	92411	San Bernardino
91758	Ontario	92415	San Bernardino
91762	Ontario	92418	San Bernardino
91764	Ontario	92277	Twentynine Palms
91766	Pomona	92278	Twentynine Palms
91701	Rancho Cucamonga	91784	Upland
91730	Rancho Cucamonga	91786	Upland
91737	Rancho Cucamonga	92280	Vidal
91739	Rancho Cucamonga	92399	Yucaipa
92373	Redlands	92284	Yucca Valley
92374	Redlands		

3. **Minimum Rider Criteria.** Vanpools must meet a minimum 70% occupancy rate to qualify for enrollment in the Vanpool Program. The occupancy minimums are a SBCTA requirement and are not negotiable. The minimum occupancy at Vanpool Program startup, per van size, is as follows:

<b>Van Size (Driver + Passengers)</b>	<b>Minimum Occupancy To Meet 70% Requirement</b>
7 Passenger Van	5
8 Passenger Van	6
9 Passenger Van	7
10 Passenger Van	7
11 Passenger Van	8
12 Passenger Van	9
13 Passenger Van	10
14 Passenger Van	10
15 Passenger Van	11

**Note:** For qualification purposes the number of passengers required to qualify has been rounded up. For example, a 13-passenger vanpool minimum occupancy requirement is 9.1 passengers and is rounded up to 10 passengers since a vanpool will never meet the SBCTA Guidelines if 9.1 passengers are rounded down to 9 passengers.

4. **Vendor(s).** The vanpool must be leased from one of SBCTA’s approved vanpool leasing vehicle vendors [referred throughout as Vendor(s)] and must be leased by a vanpool participant (an employee) or one of the vanpool participants’ Employers. The current Vendors are (to be determined) and are listed at System.org. A vanpool lease or arrangement with any other 3rd party will not qualify to participate in the Vanpool Program and such vanpool arrangement would not be eligible to apply for the SBCTA Vanpool Program.
  
5. **Privately Owned Vanpools Are Not Eligible.** Private transit, private shuttles, private vanpools (such as but not limited to, Employer-owned vanpools and/or employee-owned and operated vanpools) are not eligible.
  
6. **Ongoing Reporting Occupancy.** To continue to receive a SBCTA subsidy, vanpools must maintain on a monthly average a 70% occupancy rate to remain qualified for the Vanpool Program. Please refer to the table below, which identifies the specific monthly target, by van size that must be maintained to continue participating in the Vanpool Program.

<b>Van Size (Driver + Passengers)</b>	<b>Minimum Monthly Average Occupancy To Meet 70% Requirement</b>
7 Passenger Van	4.9
8 Passenger Van	5.6
9 Passenger Van	6.3
10 Passenger Van	7.0
11 Passenger Van	7.7
12 Passenger Van	8.4
13 Passenger Van	9.1
14 Passenger Van	9.8
15 Passenger Van	10.5

**Example:** An 11-passenger van has a monthly target average of 7.7 passengers, and there are 8 passengers assigned to this vanpool. The vanpool commuted 22 days, of which 16 days there were 8 passengers and for 6 days there were 7 passengers. The monthly average is 16 days X 8 passengers = 128, plus, 6 days X 7 passengers = 42. The monthly passenger total was 128 + 42 = 170 passengers during that month. The 170 passengers divided by 22 days results in a monthly average of 7.727 passengers per day. This van meets the 70% minimum occupancy requirement for this month.

*Note: SBCTA will provide you with reporting tools that will track daily statistics and automatically calculate this number for you.*

Should the vanpool occupancy fall below 70% during a monthly period, the vanpool will have three months to increase occupancy. If after this three-month period, the vanpool’s occupancy does not meet the 70% minimum, then SBCTA will terminate the subsidy.

**7. VANPOOL APPLICATION PROCEDURES:**

- A. Overview.** Only the van's Leaseholder may apply to the Vanpool Program. The Leaseholder is responsible for qualifying and applying to the Vanpool Program, which entails gathering a variety of information about the vanpool and the passengers. In addition, the Leaseholder must ensure that the vanpool Vendor is aware that an application is being submitted. SBCTA only accepts applications and monthly reports/logs through its online/web-based system (referred throughout as System or System..org). If you do not have access to a computer or the internet, contact SBCTA for assistance at [vanpool@SBCTA.org](mailto:vanpool@SBCTA.org) or call the 800 number (to be determined).

Upon application approval by SBCTA, the Leaseholder will serve as the Primary Vanpool Administrator and be required to maintain accuracy of information on System.org, track vanpool participation, and submit monthly reports on time. The Leaseholder may designate an Alternate Vanpool Administrator to assist with the monthly reporting process (Reference Section 7.C.vi).

Follow the steps below to Qualify and Apply to the Vanpool Program.

**B. Qualification**

- i. Log onto System.org and select the "Get Started" button. The System will ask you a few simple questions to determine if you qualify for the Vanpool Program. If you meet the minimum qualifications outlined in the Eligibility Requirements (Reference Section 1), the System will notify you that you qualify and how to proceed. If you do not qualify, the System will inform you why, and you may try again (if you inputted in error) or contact SBCTA for clarification.
  - a) If you have an existing vanpool lease from one of SBCTA's Vendor(s), follow the instructions in Section 7.B.iii.
  - b) If you have an existing vanpool lease or arrangement from any other 3rd party company, you are not qualified to participate in this Vanpool Program. Should you lease or change your lease to one of SBCTA's Vendor(s), you may proceed to qualify for the Vanpool Program by following the instructions in Section 7.B.i.

Upon qualification, you will be asked to create a username and password, so that you may continue with the application process.

- ii. If you qualify for the Vanpool Program, but do not already have an existing lease, you will need to contact SBCTA's Vendor(s) to compare their lease rates and their terms and conditions. You are only required to enter into a month-to-month lease with the Vendor(s) and rates will never exceed those that are publicized on System.org [note these are maximum rates and rates are negotiable with the Vendor].
- iii. If you already have a lease with a SBCTA Vendor, or once execution of a lease has begun, you will need to finalize your route, recruit riders, set fares and policies, and so on. The designated Primary Driver must also fulfill any legal requirements with the Vendor(s) for driving a vanpool. Your Vanpool Vendor is an invaluable ally in your efforts to pull together a vanpool and can assist in all of these areas, including

recruitment of riders.

### C. Application Submittal

After qualifying for the Vanpool Program and initiating a lease with a Vendor, log back onto System.org and complete the application by providing the following information:

- i. **Starting Location:** The vanpool begins its route when the driver starts up the van each commuting day. The location, whether it's the driver's home, a Park and Ride lot, or other designated location, will be considered the first "pick up" location of the vanpool route. Note that Post Office Boxes are not permitted; a physical location must be entered into System.org.
- ii. **Pick Up and Drop Off Locations:** Identify all location(s) that you will be picking up vanpool participants on your way to the end destination, as well as the location(s) that you drop off passengers at worksite. A cross street or address of each location is required, or you may use a mapping tool on the System.org website.
- iii. **Participant Information:** Enter the names, email addresses, contact phone numbers and employer names for each of the vanpool participants, including the Primary Driver.
- iv. **Participation Agreement:** The Leaseholder will be required to read, agree to, and electronically sign the online Participation Agreement at System.org.
- v. **Primary Driver:** The Leaseholder must include and identify a participant as the identified Primary Driver on the passenger list (if the Leaseholder is also not the Primary Driver). When the Leaseholder identifies one of the passengers as the Primary Driver, the System, will email the Primary Driver a request to log onto the System.org website, create a username and password, and read, agree to, and sign the Participation Agreement. The Primary Driver reviewing and submitting a Participation Agreement is a Vanpool Program requirement.
- vi. **Alternate Vanpool Administrator:** You have the option to select ONE passenger as an Alternate Vanpool Administrator, who will be allowed to submit monthly reporting information. When identifying this passenger, select "Alternate Vanpool Administrator" and the System will email them a request to log onto the System.org website and create a username and password. This is especially helpful should the Leaseholder be away from the office or on vacation when reports/logs are due.
- vii. **Vanpool Leasing Agency:** Select your SBCTA-approved Vendor.
- viii. **Vanpool Start Date:** Identify your anticipated vanpool start date.
- ix. **Submit Application:** Select the "Submit Application" button. If any application information is missing or incomplete the System will notify you that your application was not submitted and will highlight the areas that require correcting before you can

proceed. You will be required to make the changes prior to submitting the application and receiving confirmation that the application was submitted.

- x. After **“Submitting”** the application, your leasing agency (Vendor) will be notified and they will be required to submit specific information about the van and upload to System.org a copy of your executed lease. SBCTA will review the application and possibly contact you, your vanpool participants and/or Vendor for additional information.

Upon approval, SBCTA will notify you with the start date of your subsidy and the exact amount of your subsidy. Note that all subsidies start the first of the month following approval – there is no proration for partial months.

Should your application not be approved, SBCTA will contact you with the reasons why and potential next steps.

#### **VANPOOL PROGRAM RULES AND PROCEDURES:**

8. **Ineligible Vanpool Subsidies/Incentives.** Once SBCTA approves a vanpools' participation in the Vanpool Program, the participants in the vanpool (including the Primary Driver, Alternate Vanpool Administrator and passengers) are no longer eligible to receive subsidies from a neighboring public agency Vanpool Subsidy Programs (such as the Victor Valley Transit Authority, Los Angeles County Metropolitan Transportation Authority, Orange County Transportation Authority, Riverside County Transportation Commission (RCTC), SunLine Transit Agency or the San Diego Association of Governments, etc.). Vanpool participants are also not eligible to receive any further vanpool subsidies from the IE Commuter program, funded by the RCTC and SBCTA, including but not limited to a staggered nine-month vanpool subsidy and the three-month, \$2 a day gift card program. Accepting subsidies from any of the above-mentioned programs while receiving a SBCTA vanpool subsidy simultaneously will immediately disqualify the vanpool and its participants from participating in the SBCTA Vanpool Program.
9. **Other Eligible Subsidies/Incentives.** The types of incentives or subsidies that are permitted while receiving the SBCTA Vanpool Subsidy are Employer Subsidies, which are provided directly to any of the vanpool participants by their Employer. This includes, but is not limited to, the Federal Mass Transportation Benefits Program (MTBP) provided to many qualified federal employees. In addition, IE Commuter offers a reward program (Rideshare Plus) for San Bernardino County residents that have been ridesharing for three or more months. Eligible vanpool participants are permitted to participate in the IE Commuter Rideshare Plus rewards program by applying at [IECommuter.org](http://IECommuter.org) or calling 1.866.RIDESHARE (866.743.3742).
10. **Subsidy Amount.** For vanpools that qualify and whose applications are approved, SBCTA's subsidy per vanpool is based on 50% of total lease costs for the vanpool each month not to exceed \$400 per month. For example, if a vanpool's total lease costs are \$700 per month, then the subsidy will be 50% of the lease or \$350 per month. The monthly subsidy will be determined based on the Participant Monthly Report (Described in Section 15), submitted by the Leaseholder or the Alternative Vanpool Administrator each month and may vary from

month-to-month based on the information submitted into System.org monthly log/report. Should vanpool passengers leave the vanpool, the remaining vanpool passengers and the driver are responsible for covering all of the non-subsidy vanpool costs.

11. **Subsidy Payment.** SBCTA pays the subsidy directly to the Vendor on a monthly basis, and payment is based on an approved application, as well as the vanpool Leaseholder or the Alternative Vanpool Administrator submitting a Participant Monthly Report directly to SBCTA (Reference Section 15). The remaining costs not covered by SBCTA's subsidy are billed by the Vendor to the vanpool Leaseholder, who then recovers the balance of the costs from the vanpool passengers.
  
12. **Restriction on Vanpool Vehicle Usage.** Participating vanpools shall be used for commuting purposes to a worksite originating or ending in the Service Area including incidental trips. "Work commuting purposes" refers to pick-up and transport of passengers between vanpool route origin, route pick-up locations, and route worksite destination(s) including detours. Incidental trips are limited to maintenance and servicing of vehicle. A Leaseholder may incorporate additional miles into the monthly lease cost with the Vendor, but those miles shall be 20% or less of the total van miles traveled during a month period.

**OTHER VANPOOL PROGRAM REQUIREMENTS:**

13. **Federal Requirements.** Vanpools must meet Federal Transit Administration (FTA) public transit requirements. One of the requirements is that the vanpool must be advertised and open to the general public. To this end, SBCTA will promote all vanpool routes and schedules, advertise empty seats in the vanpool and provide referral services for Vanpool Program participation and vanpool seat availability. In addition, a member of the public who is not affiliated with a particular Employer is entitled to be a passenger in a vanpool serving the geographical area that the vanpool travels to, if there is an opening and the work hours, as well as origin, destination, and routes are compatible. For example, if an employee of Company A in downtown San Bernardino has requested to join a Company B vanpool that is located within walking distance to the Company A's destination in the City of San Bernardino and there is an open seat, the vanpool would be required to accept them subject to payment of the monthly fee. The departure and arrival times must be the same, and the origin must also be close to the origination and normal route of the vanpool. There must be a reasonable accommodation, and should there be any questions, contact [SBCTA](#).
  
14. **Accommodations for Riders with Disabilities.** Vanpools must meet the Federal Americans with Disabilities Act (ADA) requirements. If there is a vacancy in a vanpool and a person with a disability applies for a seat, the vanpool and the vanpool Vendor must make accommodations for the individual to become a vanpool member. SBCTA contractually requires its Vendors to comply with this ADA requirement. Note that additional charges may apply to modify a leased vanpool to accommodate a rider with a disability.
  
15. **Participant Monthly Report.** Logging (documenting your vanpool commute) and submitting the Participant Monthly Report is simple and required each month. The Leaseholder or Alternative Vanpool Administrator must track information from the first of the month to the

last day the vanpool operates during a calendar month period. For each day the vanpool operates, the following is required to be completed and submitted on System.org:

- i. On a daily, weekly, or monthly basis, log which of the passengers on the passenger list commuted to and from the worksite during respective commute days for the month.
- ii. At the end of the month, summarize the vanpool's out of pocket costs during the reporting month (fuel, fluids/oil, car washes and so on) and record the last odometer reading of the month.
- iii. Submit your Participant Monthly Report by the 5<sup>th</sup> day of the following month.

16. **Vanpool Updates.** The Leaseholder is responsible for maintaining the information submitted into System.org. Should there be changes in passengers, route, drop off or pickup locations, or scheduling information, it is the Leaseholder's responsibility to log into System.org and update that information no later than five (5) business days after the change takes place. At a minimum, it is in the Leaseholder's best interest to review all the System information before inputting or finalizing the Participant Monthly Report which will make reporting go much more smoothly if the information is accurate and up-to-date.

17. **Vendor Reports.** The Vendor(s) must submit various reports to SBCTA periodically, monthly and annually, to verify vanpool participation and lease costs, as well as detailed vehicle information required by federal reports.

18. **Termination.** The Leaseholder may withdraw from the SBCTA Vanpool program at any time. Upon doing so, the monthly subsidy will be prorated based on the actual days of participation during the final month. SBCTA may terminate a vanpool for a variety of reasons, which are identified in the Participation Agreement. To request a copy of the Participation Agreement, please contact SBCTA at [vanpool@SBCTA.org](mailto:vanpool@SBCTA.org) or call us at our 800 number (to be determined) .