

Grant Application Instructions

The following materials must be submitted electronically through [BidNet](#). Applications cannot be emailed. If any of the required components are not completed and included with the application by the submittal deadline so that it can be fully evaluated without negatively impacting the fairness of the competitive process, the application will be deemed ineligible.

Required Components

- Completed Grant Application
- Map(s) of Proposed Service Area(s)
- Project Scope of Work
- Project Budget
- Copy of Commission-issued Charter-Party Carrier permit for each entity that will provide the on-demand WAV services, including third-party contract providers (unless a non-permitted transportation carrier demonstrates and affirms compliance with the Safety Declaration Protocol Form included in the application)

Recommended Components

- GIS shapefile (zipped file) of service area
- Resolution including all statements provided in the Sample Resolution

Project Scope of Work and Project Budget

The Project Scope of Work and Project Budget templates are available in [BidNet](#).

If a project is selected to receive funding, the Project Scope of Work and Project Budget will be added to the Grant Agreement with any adjustments required by SANDAG. The Applicant will be held responsible for implementing the project in accordance with the Project Scope of Work and Project Budget. Guidance for completing the Project Scope of Work and Project Budget templates has been provided below.

Project Scope of Work

The Project Scope of Work template has been developed to include the minimum tasks that all Applicants will be required to perform in **bold text**. The method each Applicant uses to complete each task (milestone) can vary. SANDAG has provided sample milestones that could be used to successfully achieve each task, as shown in the template. Applicants must update these sample milestones to demonstrate how they will complete the task.

Project Budget

The Project Budget template has been developed to match the Project Scope of Work template and to provide the format through which Applicants can illustrate their proposed project costs. Applicants that intend to apply indirect costs to their proposed project should ensure that the indirect costs are incorporated into the Project Budget.



Access for All Grant Program

Cycle 2

Grant Application

Part I – Applicant and Project Background

Applicant Information

Applicant Legal Name	Butterfli Technologies Inc.
DBA (If Applicable)	
Applicant Address	865 S. Figueroa Street Suite 2750 Los Angeles, CA 90017
Contact Name	Geri Willis
Title	Chief Operating Officer
Phone	213-220-5884
Email	geri@gobutterfli.com

Project Information

Project Title	Access for All San Diego
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Project Manager

List the day-to-day Project Manager (PM) who will be responsible for the services.

Individual Name	Geri Willis
Title	COO and Implementation Manager
Phone	213-220-5884
Email	geri@gobutterfli.com

Additional Contacts for Grant-Related Correspondence

Include the individual(s) who will prepare the monthly reports, submit invoices, or otherwise be involved in the project.

Role Description	Project Start up and Implementation
Individual Name	Danielle Wiltz
Title	Controller
Phone	213-305-1474
Email	danielle@gobutterfli.com

Role Description	Onboarding Manager
Individual Name	Sid Kamara
Title	Business Development Manager
Phone	213-489-2010
Email	sid@gobutterfli.com

Role Description	
Individual Name	
Title	
Phone	
Email	

Role Description	
Individual Name	
Title	
Phone	
Email	

Project Budget

AFA Funding Request

Total AFA Grant Request Amount	\$2,300,000.00
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Matching Funds (if applicable)

List the source(s) and associated dollar amounts of proposed matching funds. Matching funds can consist of in-kind services or cash match from the applicant, and/or funds from outside sources.

Source of Funding	SANDAG San Diego, Access For All Grant Funding
Amount of Funding	

Source of Funding	
Amount of Funding	

Source of Funding	
Amount of Funding	

Total Matching Funds Provided	
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Indirect Costs

1. Does the applicant intend to include indirect costs in the Project Budget? **NO**

☐ Yes

☐ No

2. What type of Indirect Cost Rate (ICR) will be used? **N/A**

☐ De Minimus

☐ Federally Negotiated Indirect Cost Rate (FNICR)*

☐ I will not include direct costs in the Project budget.

*If FNICR, please include the FNICR with the Application.

Part II – Baseline Data*

The information in this section will not be scored, but will be evaluated as a baseline. The existing AFA provider shall submit response time data for the preceding four quarters, if available.

WAV Information*

3. How many WAVs does the Applicant currently have in operation? Please provide information by quarter and aggregated by hour of the day and day of the week. The template entitled "WAVs in Operation", [available online from the CPUC website](#) should be used. A sample completed form [is available here](#).
4. Using the CPUC template entitled "WAV Trips", [available online here](#), provide the number and percentage of WAV trips completed, not accepted, cancelled by passenger, cancelled due to passenger no-show, and cancelled by driver – by quarter and aggregated by hour of the day and day of the week. For WAV trips completed, Applicants have the option to demonstrate an increase in the number of trips completed or an increase in the percent of trips completed. A sample completed form [is available here](#).
5. Provide completed WAV trip request response times in deciles by quarter for the proceeding four quarters, if available. This should also include a report of the 75th percentile response times, specifically, for that quarter. The template entitled "Response Times", [available online from the CPUC website](#) should be used. A sample completed form [is available here](#).
6. Using the CPUC template entitled "Outreach", [available online here](#), Evidence of outreach efforts to publicize and promote available WAV services to disability communities, which may include a list of partners from disability communities, how the partnership promoted WAV services, and marketing and promotional materials of those activities. A sample completed form [is available here](#).

** Data from the WAV information section will be evaluated as a baseline for how applicants can improve upon the following: WAV response times compared to the previous year the presence and availability of WAVs within the proposed service area; and efforts undertaken to publicize and promote available WAV services to disability communities.*

Safety, training, and insurance information

1. Using the CPUC template entitled "Training and Inspections", [available online here](#), provide the following information. A sample completed form [is available here](#).
 - Report of WAV driver training programs used and number of WAV drivers that completed the training in the prior year
 - Certification that all WAVs operating on the Access Provider's platform have been inspected and approved to conform with the ADA Accessibility Specifications for Transportation Vehicles within the past year.
2. Provide the number of complaints received related to WAV drivers or WAV services, categorized as follows: securement issue, driving training, vehicle safety and comfort, service animal issue, stranded passenger, and other. The template entitled "Complaints", [available online from the CPUC website](#) should be used. A sample completed form [is available here](#).

Financial information

Using the CPUC templates entitled "Funds Expended", [available online here](#), and "Contract Information", [available online here](#), provide the following information. Sample completed forms are available at the following links – [Sample Funds Expended](#) form; [Sample Contract Information](#) form.

- Estimated income (categorized by passenger revenue, other revenue; and total grants, donations, and subsidy from other agency funds)
- Estimated expenses (categorized by wages, salaries, and benefits; maintenance and repair; fuels; casualty and liability insurance; administrative and general expense; other expenses; contract services)
- List and explain all sources of operating revenue, including revenue from grants, donations, and local fundraising projects that will be used to fund the Program, for the prior, current, and budget year.

***Note:** If any of the above Baseline Data is unavailable or not applicable, please describe in the space provided on the next page.

Butterfli operates the Access for All service in Los Angeles County under Los Angeles County (LA AFA) Metro. Reports for the LA AFA program are available in digital form by request and by approval from Los Angeles County Metro.

Butterfli Data Capture and Reporting Capabilities

Butterfli's Platform and Data Capture and Capabilities:

- A. AFA Specific Data Collection- Updated to include new CPUC-required data points as of March 2024.**
 - 1. Number of Operating WAVs
 - 2. WAV Trip Report
 - 3. WAV Response Times
 - 4. Trip Completions Standards
 - 5. Outreach
 - 6. Training and Inspections
 - 7. Complaints
 - 8. Funds Expended
 - 9. Contract Information
- B. Ride Booking Activity and Query
- C. Ride Data by Ride I.D. Sort by Various Data Points
- D. Route – Proprietary Route System for Efficient Routing
- E. Enterprise Client Data – Specifically for our Clients, Including AFA
- F. Providers and Provider Users
- G. Vehicles, Information, Data and Photos
- H. Driver Information and Photos, Certificates, Qualifications
- I. Consumer/Customer Data Query
- J. Alerts- Real-time SMS Notifications Report
- K. Live Real-Time Tracking Screens
- L. Portal Generated Reports
- M. Billing Information Per Client
- N. Data Analytics Based on Data Points- Data Export Reporting- File Downloads
- O. Transportation Provider Compliance, Drivers, Vehicles
- P. Rider Information
- Q. Hot Spot Mapping
- R. Route- Proprietary Routing System Generated Reporting for Routes
- S. Service Zones Schedules and Timetables
- T. Other Reports As Requested

Part III – Project Details

1. Project Readiness and Technical Capacity

- A. Provide the following information for all entities that will provide the on-demand WAV services, including Applicant and any third-party contract providers, as applicable.

Entity Name	Butterfli Technologies Inc.
Charter-Party Carrier Status	☐ Holds a Commission-issued Charter-Party Carrier permit ☐ Non-permitted transportation carrier N/A Butterfli is not a Charter-Party Carrier. Listed below are the providers that will perform services for Butterfli for the San Diego Access for All Program.
Number of WAV vehicles in current fleet (or projected number if purchasing/leasing by Notice to Proceed date)	Initially, for start-up, 6 Vehicles will be scheduled for usage for the program and will be operated by the service providers listed below.
Projected date when on-demand WAV services will begin	12/1/2024, This date is based on the project start date of November 1, 2024. Services will start within 30 days.
Anticipated hours of operation	7:00 am to 6:00 pm Monday through Friday (May change based on demand) 8:00 am to 3:00 pm Saturday and Sunday (May change based on demand)

Entity Name	SMS Transportation Services YES Hold Charter Party Carrier Permit
Charter-Party Carrier Status	☐ Holds a Commission-issued Charter-Party Carrier permit ☐ Non-permitted transportation carrier
Number of WAV vehicles in current fleet (or projected number if purchasing/leasing by Notice to Proceed date)	6 Vehicles in rotation to be operated by SMS for San Diego AFA Service. Full Fleet available 50 vehicles.
Projected date when on-demand WAV services will begin	12/2/2024
Anticipated hours of operation	7:00 am to 6:00 pm Monday through Friday

Entity Name	Care 1 Transportation Services YES Hold Charter Party Carrier Permit
Charter-Party Carrier Status	☐ Holds a Commission-issued Charter-Party Carrier permit

	☐ Non-permitted transportation carrier
Number of WAV vehicles in current fleet (or projected number if purchasing/leasing by Notice to Proceed date)	2 Vehicles in rotation to be operated by Care 1 for San Diego AFA Service. Full fleet available 8 vehicles
Projected date when on-demand WAV services will begin	12/2/2024
Anticipated hours of operation	7:00 am to 6:00 pm Monday Through Friday 8:00 am to 3:00 pm Saturday and Sunday Optional: Friday, Saturday, Sunday 7:00 pm to 11:00 pm

Entity Name	
Charter-Party Carrier Status	☐ Holds a Commission-issued Charter-Party Carrier permit ☐ Non-permitted transportation carrier
Number of WAV vehicles in current fleet (or projected number if purchasing/leasing by Notice to Proceed date)	
Projected date when on-demand WAV services will begin	Click or tap to enter a date.
Anticipated hours of operation	

Entity Name	
Charter-Party Carrier Status	☐ Holds a Commission-issued Charter-Party Carrier permit ☐ Non-permitted transportation carrier
Number of WAV vehicles in current fleet (or projected number if purchasing/leasing by Notice to Proceed date)	
Projected date when on-demand WAV services will begin	Click or tap to enter a date.
Anticipated hours of operation	

Entity Name	
Charter-Party Carrier Status	☐ Holds a Commission-issued Charter-Party Carrier permit ☐ Non-permitted transportation carrier
Number of WAV vehicles in current fleet (or projected number if purchasing/leasing by Notice to Proceed date)	
Projected date when on-demand WAV services will begin	Click or tap to enter a date.
Anticipated hours of operation	

- B. Describe what experience the Applicant has in managing a grant-funded project. Include examples such as prior grant-funded projects or other instances when Applicant provided services on a reimbursement basis to another party and/or was subject to regulatory or other monitoring requirements.

The San Diego AFA program operated by Butterfli will mirror the successful program currently operated for the Metro Los Angeles AFA program. Metro highly regarded the Los Angeles AFA program. References from the Metro programs manager is available on request.

Access for All Los Angeles—Butterfli operates the Los Angeles Access for All program under Los Angeles County Metro. Butterfli received the largest grant amount for the funding year and is currently the staff recommendation for 2024-2025 (the final vote by the Metro board will be June 2024).

Butterfli operates 10 vehicles in 3 of the 5 Metro Zones in the county of Los Angeles. AFA provides services primarily for WAV riders, persons with disabilities, and seniors with disabilities in underserved communities. Butterfli performs 1,600 to 2,100 rides per month, and over 65 of the rides are consistently for individuals in wheelchairs, and 97% of the rides are on-demand and performed within 12 hours of booking the ride. The total number of rides performed as of May 2024 is 11,000

- **Budget:** \$4.1 Million, one-year program, 2023-2024

EnableLA- A partnership with HKMC (Hyundai Kia Motor Corp.). This 8-month pilot program operated in greater Los Angeles. The pilot was successful, and Butterfli continues to operate the program to collect data for HKMC. Butterfli uses a single provider to perform the service. The program uses WAV-modified vehicles designed by HKMC in partnership with MoceanLab and Butterfli. The pilot operated for eight months with HKMC, and then the vehicles were donated to Butterfli. These vehicles were enhanced for a better user experience with input from the Butterfli team and its Round Table influencers. Butterfli worked with the HKMC team and performed outreach and marketing.

- **Budget:** \$2.3 Million over an active 9-month pilot program. 2020-2021

FlexWAV- A Grant-funded pilot program that provides discounted rides to eligible WAV consumers and persons needing assisted transportation. Butterfli continues to provide this service for the community in a designated Los Angeles area.

- **Budget:** \$525,000.00 1 Year pilot program. 2018-Current

FlexLA- A public-private funded program with Butterfli in partnership with FastLinkDTLA, LA Metro, LADOT, LACI and Moovel (a Daimler Mercedes Benz Company), and SMS Transportation. Provided shuttle service in DTLA after hours Monday through Sunday. ButterFLi managed the pilot for the participating team.

- **Budget:** \$1.3 Million over 14 months. 2019-2021

ButterFLi WAV Mobility Round Table- Butterfli, in partnership with HKMC (Hyundai Kia Motor Corporation), organized a group of influencers in the disability community to participate and provide useful, impactful feedback about the transportation challenges in the WAV community. This group's input ultimately helped HKMC with their R & D to design an in-market WAV vehicle prototype.

- **Budget:** \$25,000.00

2. Coordination and Program Outreach

1. Describe how the Applicant will publicize and promote the available on-demand WAV services to disability communities. Provide an outline of the planned outreach activities either in the space below or as an attachment and include the proposed dates, any partners, marketing,

and promotional materials that will be used, and any other details.

Butterfli is uniquely qualified because of our success with the Los Angeles Access for All program and our extensive experience in administering WAV services. We will use proven methods to promote the program and reach the disability community. This outline displays our method and approach to promoting and advertising the program. Butterfli has relationships with ADA advocates and organizations in the San Diego Community. We will use these relationships and our local advocates and influencers to identify the best media and outreach touchpoints.

- Work with our local PR and media firm to identify and meet with disability community organizations and advocates to promote and advertise the program.
- Start grassroots advertising directly in the communities identified as primary service areas.
- Work with local organizations to partner with and engage them in advocating for the program and using our ride-booking portal to book rides for WAV riders.
- Work with city officials to identify the best catchment areas for short-term visitors and work to enact best practices for promoting the service for these individuals. Having a deep link in the Uber and Lyft apps could be a method for promoting the service to visitors and travelers.
- Develop a webpage for SD AFA information and Ride booking.
- Work with local community advocates to educate them about the program and how WAV users can participate and use the service.
- Meet with local community leaders to identify organizations and communities needing WAV service.
- Develop digital and printed materials and collateral for distribution.
- Identify the best media outlets and engage social media platforms with specific Access for All advertising.
- Engage grassroots community activists and advocates to penetrate the community.
- Expand the Butterfli Round Table of Influencers to include local San Francisco communities.
- Activate our local community engagement team to promote the program internally.

Target and Partner with Organizations and Advocate Partners within the San Diego Community

- Butterfli's Round Table Influencers and Advisory Board Members
- The ARC San Diego- Advocate group for persons with disabilities
- Regional Centers in San Diego- Administrators for persons with disabilities
- People with Disabilities Foundation- Advocates for persons with disabilities
- Senior and Disability Actions Group- Advocates for persons with disabilities
- Disability Rights of California- Advocates for persons with disabilities
- Local Community organizations that focus on people in underserved areas and advocate for people with disabilities in San Diego
- City Council thought leaders for the disability community for people in disparity communities
- San Diego County transportation coordinators for the SD AFA service areas
- Community Non-Profit Organizations (CBO's) partnerships

For LA AFA, we partner with over 102 Organizations and groups that service the disability and senior communities.

2. Describe how the Applicant will market and promote public awareness of its on-demand WAV services in both low-income and minority areas as well as with populations with limited English proficiency. Provide the methods and strategies to be used and explain how the Applicant will know whether its efforts effectively reach these populations.

Butterfli will initiate a full marketing and outreach campaign to publicize and promote the San Diego AFA program in the communities that use the on-demand WAV services. Promotional materials can be in multiple languages as necessary. The customer care call center provides bilingual representatives during work hours. Additionally, the automated voicemail and IVR can be designed for multilingual messaging for non-English-speaking individuals.

Butterfli's outreach team will work with our community engagement partners to initiate and perform the following:

- Develop a webpage dedicated to San Diego AFA on the Butterfli Website.
- Develop and distribute collateral and materials to AFA partners, including their websites or other media outlets.
- Launch a digital and social media campaign to advertise and promote the San Diego AFA program.
- Arrange meetings with local community-based organizations to promote the program.
- Partner with community-based organizations to assist the community in understanding the program and booking rides using their unique real-time ride-booking portals.
- Meet and collaborate with local political and government leaders and transportation coordinators to promote and advertise the program.
- Work with local council members and supervisors to identify specific preferred organizations within their constituent's neighborhoods that we can partner with to promote the program. This initiative will focus on low-income and minority areas.
- Cost-friendly TV, radio, and cable media outlets should be used to advertise the program.
- San Diego AFA drivers will distribute program information on board to hand out as promotional materials and to provide information about the program.

Butterfli will provide feedback statistics and information from ridership data and digital media sources to identify the most effective methods and means of advertising and ridership.

Butterfli regularly conducts customer surveys and has a full-service customer engagement call center with live operators from 8:00 a.m. to 5:00 p.m. (these hours may adjust as needed). There is also an after-hours emergency service and voicemail capability.

Butterfli regularly meets with our influencers, community engagement partners, political advocates, and community-based organizations to gather information and feedback from the community regarding the services.

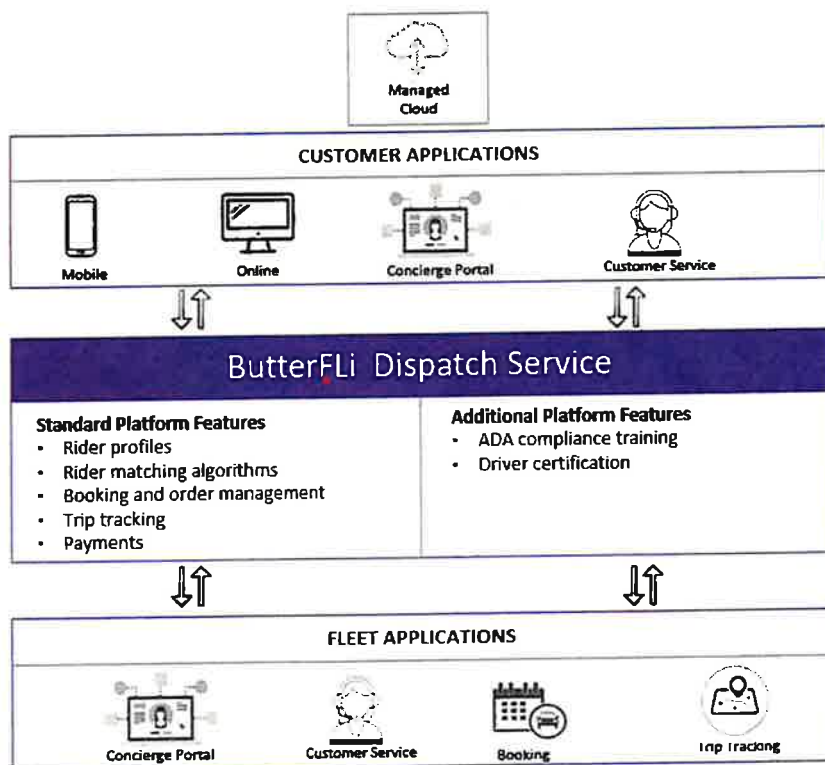
See Attachment #1- "Sample Program Collateral"

3. Will the Applicant's on-demand WAV services be made available to individuals who do not have a smartphone, internet, or otherwise need additional assistance in requesting the service? What alternative means will the Applicant use to provide its services to these users?

The Butterfli San Diego AFA program on-demand WAV services will be available to individuals without smartphones or the internet or who otherwise need additional assistance requesting service.

Butterfli offers a full-service customer engagement call center and a website that is available to the public 24/7. There are live operators from 8:00 a.m. to 5:00 p.m., and voicemails are returned immediately or the next business day, depending on the call type. Emergency calls are responded to immediately.

Butterfli's AFA program in Los Angeles has been highly successful. Our operators and logistics specialists are trained to provide prompt, friendly, professional service to the public. We will use this same call center with agents dedicated to the San Diego AFA program, using agents trained to help and information specific to the San Diego customer base.



4. Describe how the Applicant will actively involve the disability community in the planning and development of the project, through the engagement of groups such as a disability-led advisory council or having input from individuals with Lived Experience on their Board of Directors. Please

provide details about how current or proposed procedures will ensure that the input of individuals with disabilities is incorporated into the planning and development of the program.

Butterfli will actively involve the disability community in the planning and development of the project through the engagement of our Butterfli Influencer Round Table Advisory Board, Disability-led advisory council and individuals within the disability community.

Butterfli's business model is built on experience within the disability community. The owners have owned and operated a NEMT transportation company for over 20 years that transports for Los Angeles County Regional Centers and other health care and disability organizations. Butterfli was founded on this experience with a focus on introducing real-time, on-demand technology to enhance the rider experience and provide equity for individuals that need assisted transportation.

Our current business model includes regular collaboration with individuals who experience disability due to limited mobility options because of physical or intellectual disabilities, age, health or other reasons. We created our Butterfli Round Table of Influencer and Advisory Board because we understand the need to engage individuals directly for input, ideas, experiences and advice. We have regular Round Table Forums where we invite individuals that experience the inequity because of their disability or the lack of viable affordable transportation options. Over the past 2 years Butterfli hosted 5 events that provided a platform for these individuals to express their experiences and also provide input to Butterfli on how we can engage the community to better meet their needs and provide a better customer experience. This year we included a round table specifically for our LA AFA riders to express their experiences using the LA AFA program. Our social media and website highlight our AFA team members and our team of advocates and influencer. www.gobutterfli.com. We can provide video footage of these meetings by request.

We understand the inequity in transportation today because we engage and we listen to the public. There is disparity for individuals who have limited options due to living in an underserved area or who have limited income. Butterfli also surveys our clients and riders. We perform 400 to more than 500 rides per day to WAV riders so we must engage our ridership and the community to ensure the best customer experience. We currently provide 170 to 200 rides per day to the Los Angeles AFA program riders.

Our approach to the San Diego AFA program includes collaborating with the local San Diego disability community to join our influencer advocates to provide their experiences and ideas about how we can make the program the best rider experience possible.

3. Safety

Describe the Applicant's procedures for preventative and routine vehicle maintenance. In addition, describe the Applicant's policies and procedures related to the rules of conduct for drivers providing WAV service.

Butterfli is a transportation administrator. We do not own or operate any vehicles. We have contract agreements with qualified NEMT or specialized transportation providers to perform the customer ride services. We have a full network of qualified, certified transportation providers that have passed the Butterfli compliance requirements to provide ride services as a part of the Butterfli network.

Transportation providers in the Butterfli network must meet all requirements to become a qualified provider for Butterfli. This includes verification of the company, their vehicles and drivers. Our AFA fleet providers must ensure:

1. Meet required legal company entity requirements, business license, Secretary of State Registration, or other requirements based on the service area.
2. Meet Insurance requirements to perform on particular projects.
3. Drivers must have updated CA drivers license, first aid, CPR, DOT Medical card, local transportation permits or licenses, and cleared background and drug/alcohol testing. Some projects require TB testing, live scan, or passing an internal background test for a specific agency. All drivers are required to be enrolled in the CA DMV Employee Pull-Notice Program. A list of the Butterfli Compliance Requirements is located in the attachment section of this document.
4. Vehicles are regularly inspected. There is a Butterfli inspection to ensure vehicle readiness, and a required vehicle mechanical inspection. Drivers are required to complete a Daily Vehicle Inspection Report pre and post trip. Providers vehicles must be inspected daily, and 90 days inspections are required for preventive maintenance. In addition, Butterfli requires providers to have a regular 3rd party vehicle inspection 2 times per year, and Butterfli performs quarterly compliance inspections.
5. Drivers must complete the Butterfli training modules, including, passenger safety including wheelchair safety, vehicle behind the wheel training. A Complete training list is attached at the end of this document in the attachment section.
6. Butterfli will ensure that all drivers meet the requirements outlined for this Grant Award.

See Attachments # 2 "Compliance Checklist"

See Attachment # 3 "AFA Readiness Checklist"

Background Checks

Does each entity that will provide the on-demand WAV services:

- Currently perform background checks on each of its potential drivers, based on the driver's social security number and not just the driver's name, and in the national criminal database and national sex offender database? **YES**

☒ Yes

☐ No*

- Ensure that any person who has been convicted within the past seven years of driving under the influence of drugs or alcohol, fraud, sexual offenses, use of a motor vehicle to commit a felony, a crime involving property damage and/or theft, acts of violence, or acts of terror not be permitted to provide AFA services? **YES**

☐ Yes

☐ No*

- Ensure that any potential drivers with convictions for reckless driving, driving under the influence, hit and run, or driving with a suspended or revoked license are not permitted to be an AFA driver? **YES**

☐ Yes

☐ No*

**If the answer to any of the above questions is No, provide additional information in the space below that describes how each entity that will provide the on-demand WAV services will be able to comply with each of these background check requirements at the time of grant agreement execution (see the Timeline in the Call for Projects for the anticipated date).*

Insurance

- Does the Applicant and each entity that will provide the on-demand WAV services have levels of insurance that are equivalent or higher than what is required for charter-party carriers under [General Order 115.2](#). Further information on SANDAG's insurance requirements can be found in the Call for Projects. **YES**

☐ Yes

☐ No*

*If the answer to the above question is No, provide additional information in the space below that describes how the Applicant and each entity that will provide the on-demand WAV services will be able to comply with the insurance requirements at the time of grant agreement execution (*see the Timeline in the Call for Projects for the anticipated date*).

Driver training

- Does each entity that will provide the on-demand WAV services have certification that its drivers have completed WAV driver training on transporting people with disabilities within the past three years including but not limited to sensitivity training, passenger assistance techniques, accessibility equipment use, door-to-door service, and safety procedures? **YES**

See Attachment #4 "Driver Training" Outline.

☐ Yes

☐ No*

*If the answer to the above question is No, provide additional information in the space below that

describes how each entity that will provide the on-demand WAV services will be able to comply with the driver training requirements at the time of grant agreement execution (*see the Timeline in the Call for Projects for the anticipated date*).

Controlled substance and alcohol testing

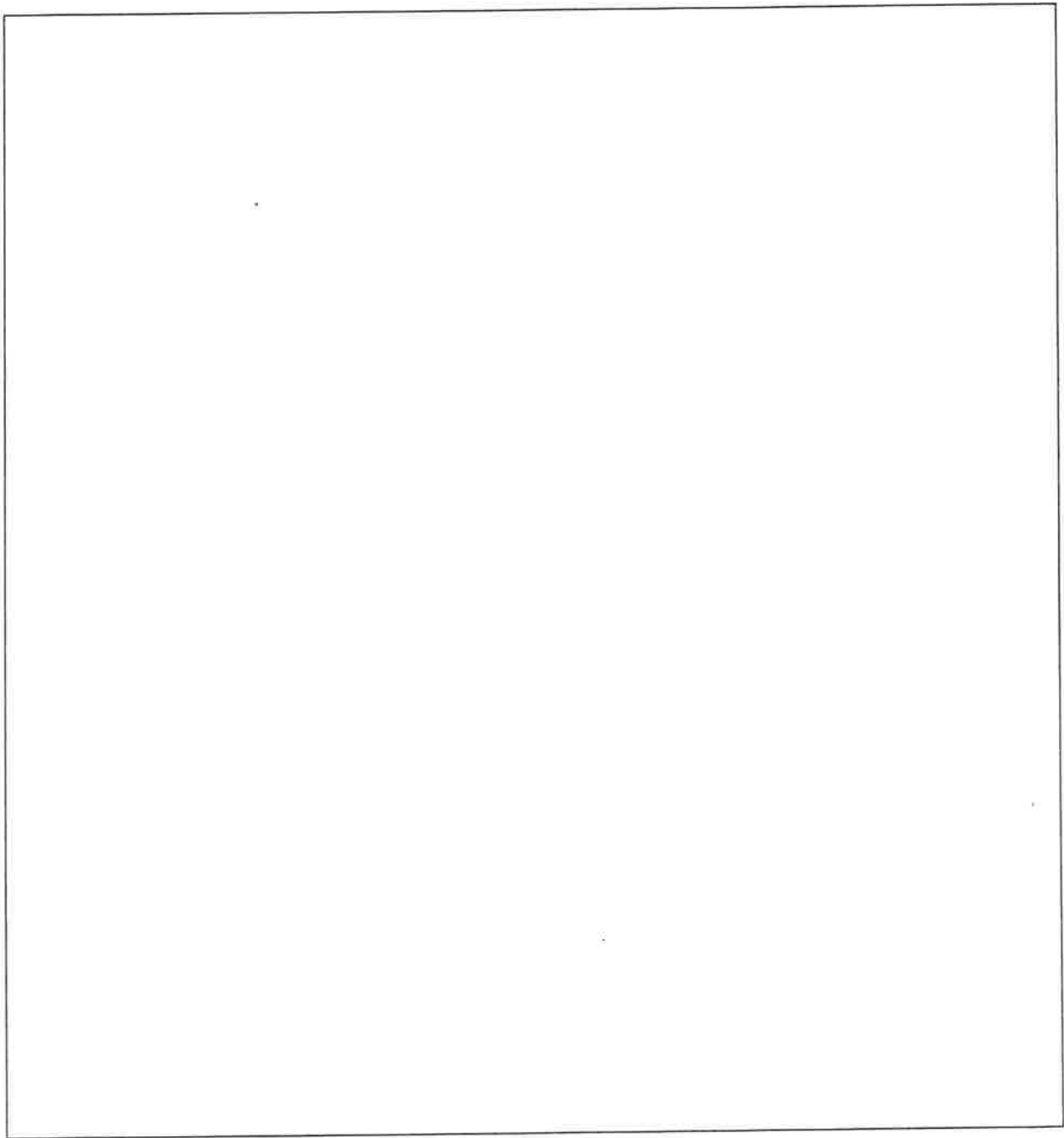
- Is each entity that will provide the on-demand WAV services enrolled in a controlled substance and alcohol testing program? **YES**

☐ Yes

☐ No*

*If the answer to the above question is No, provide additional information in the space below that describes how each entity that will provide the on-demand WAV services will be able to comply with the controlled substance and alcohol testing requirements at the time of grant agreement execution (*see the*

Timeline in the Call for Projects for the anticipated date).



Secretary of State registration

- Does each entity that will provide the on-demand WAV services have its articles of incorporation filed with the Secretary of State? **YES**

☐ Yes

☐ No*

*If the answer to the above question is No, provide additional information in the space below that describes how each entity that will provide the on-demand WAV services will be able to comply with the Secretary of State registration requirements at the time of grant agreement execution (see the *Timeline in the Call for Projects for the anticipated date*).

Motor Carrier Profile with CHP

- Has each entity that will provide the on-demand WAV services completed the [California Highway Patrol \(CHP\) 362 Motor Carrier Profile](#) and obtained a CA Number from the CHP? Please note that this requirement is not applicable to service providers that are a Social Service Transportation Provider. **YES**

☐ Yes

☐ No*

*If the answer to the above question is No, provide additional information in the space below that describes how each entity that will provide the on-demand WAV services will be able to comply with the CHP Motor Carrier Profile requirements at the time of grant agreement execution (*see the Timeline in the Call for Projects for the anticipated date*). If a service provider is an exempt Social Service Transportation Provider, please indicate below.

Inspection

- Does each entity that will provide the on-demand WAV services have certification that all WAVs have

been inspected and approved to conform with the American with Disability Act Accessibility Specifications for Transportation Vehicles within the past year, including the “19-point” vehicle safety inspection as required by the CPUC under [General Order 157-E](#)? **YES**

☒ Yes

☐ No*

*If the answer to the above question is No, provide additional information in the space below that describes how each entity that will provide the on-demand WAV services will be able to comply with the CHP Motor Carrier Profile requirements at the time of grant agreement execution (*see the Timeline in the Call for Projects for the anticipated date*).

Vehicles proposed to be used for this service will comply with this requirement.

See Attachment #5 ‘3rd Party Vehicle Maintenance Inspection Report’

4. Operational/Implementation Plan

- A. Describe how the Applicant will have sufficient WAV fleet size to be able to meet current demand for service. Explain how this can be Scalable to meet future potential demand for on-demand WAV service. Include an estimate of the hourly number of available WAVs resulting from the proposed service.

Butterfli will provide a sufficient number of WAV vehicles to meet the demand for service.

Butterfli will use current qualified approved transportation providers to deliver the service for San Diego AFA. This document lists the providers in the "Project Readiness Technical Capacity" sections on pages 6 & 7. Each provider will be assigned a designated service area and will ensure service delivery.

It is not our typical business model; however, Butterfli will consider using Uber and Lyft upon approval from the SANDAG proposal management team. We have found that some AFA programs use these TNCs while others, like Los Angeles, prefer WAV vehicles. If necessary, Butterfli is prepared to operate a full fleet of WAV Butterfli network provider vehicles for the San Diego AFA program.

Service will be provided for persons needing assisted transportation, including seniors and persons with disabilities, focusing on low-income and underserved areas. Service will be door-to-door and curb-to-curb based on the customer's needs. Trips will be provided for NEMT, shopping, and other lifestyle travel in areas where paratransit is insufficient, inappropriate, or unavailable.

Butterfli will Dedicate at least two vehicles to service each City including Vista, Escondido and San Marcos. More details regarding the selection of these cities is located further in this application. This may be adjusted as the program matures and we collect data for high-demand areas. Our approach to our supply is to immediately start with one vehicle in each City and phase in the second vehicle based on demand.

Our model is scalable to meet the demand we propose. Butterfli currently seeks additional funding from other Grant programs to augment the services. Butterfli is prepared to scale the program to offer more on-demand services should that funding materializes.

The operating hours for the San Diego AFA program will be Monday through Friday from 8:00 a.m. to 5:00 p.m. and Saturday and Sunday from 9:00 a.m. to 3:00 p.m. Based on ridership and demand, we will consider using alternate service hours to accommodate Friday, Saturday, and Sunday evenings. These hours may be changed based on the ride data captured, which will determine the best times of operation for high demand.

Butterfli will ensure that the service request/reservation hours will be 5:00 a.m. to 9:00 p.m., 7 days per week, to the public. The response time during business hours will be 1 hour for on-demand and less than 12 hours for requests made outside of the hours of 5:00 a.m. to 9:00 p.m. Note these hours of operation and vehicle supply are based on the total grant award and can be adjusted based on the amount of award and funding. This proposal is based on having 6 vehicles during the hours of operation.

- B. Describe the project's operational plan, including details on the on-demand WAV service to be provided and a description of day-to-day project operations. Include how the on-demand WAV

service will be provided on a consistent basis to ensure the Applicant will be able to meet the demand in its service area.

Butterfli will provide an on-demand transportation service for individuals who need assisted transportation. This includes people who need WAV vehicles and personal door-to-door assistance.

Butterfli's operations include the following:

- A full-service, 24/7 customer care, and call center with telephone operators and dispatch and logistics specialists. Live operators are available from 7:00 am to 7:00 pm M-F and 8:00 am to 3:00 pm on Saturday and Sunday. There is an after-hours emergency service provided by on-call operators and 24/7 voice mail that is returned within 24 hours after hours and within one hour during business hours.
- Butterfli uses a telephone operating system that offers 24/7 voicemail, voice recording, recorded messaging, multi-language messaging capability, call monitoring and tracking, and call center activity reporting.
- Rides will be booked on-demand in real-time. Customers who do not have access to smart devices or computers or who wish to book a ride with a live operator can book rides via telephone. Butterfli will also partner with community-based organizations with access to the Butterfli real-time online booking portal. Customers can also book online through the San Diego customized web page on the Butterfli website. In addition, our consumer app can be used to book rides from a smart device.
- The San Diego AFA program will be managed through our technology platform. The platform can book rides, capture data for reporting, track rides in real time, provide status updates and notifications via SMS or via telephone, and capture the required data points for the CPUC quarterly data reports.
- Rides are tracked and verified in real time via the Butterfli Admin portal.

A typical rider experience:

- The ride can be booked via the portal, online through the website, by telephone, or by customer app.
- The system will consider the time and location and auto-calculate the mileage from pick-up to drop-off points to determine the distance and whether the request is within the mileage range based on the GPS estimates. The customer's address, name, and phone number are entered along with the San Diego AFA Access Code. The customer or coordinator can also enter special notes for the passenger.
- The system will book the ride and send a confirmation notification to the booking party.
- The customer engagement center, dispatch, and logistics agents can track the booking and ride in real time. The customer or transportation coordinator can also track the passenger's ride on the portal or via the consumer app.
- The system will notify the customer and coordinator about the status of the ride, pick-up time, and vehicle location and will notify the customer upon arrival. The driver will text or call the customer once they arrive.
- The system captures the ride data at each activity touchpoint for exact ride statistics.
- Customers can contact the call center at any point during the ride.

Driver Operations:

- Drivers are assigned to rides as booked via the Butterfli platform. Drivers will accept the rides and perform the trips.
- Drivers must ensure safety precautions are performed for each task.
- Drivers provide professional service to all clients and will contact dispatch or logistics agents in an emergency if there are questions or to report incidents.
- Drivers perform vehicle safety checks and complete a DVIR pre and post-trip.

- C. Describe the Applicant's strategy to ensure completed on-demand WAV trip Response Times are reasonable and comparable to what a non-WAV requestor would receive. Explain whether the Applicant will progress toward improving Response Times and WAV presence and availability over the grant period, including a proposed strategy and goals the Applicant expects to achieve. Provide an estimate of the improvement in response times over the Baseline Data provided in Part II.

Butterfli services are managed by our operations staff in real time using our technology platform. Our agents can track rides, obtain ride status, and communicate with customers and drivers anytime.

Our operations supervisors and managers consistently review system data and reports, monitoring real-time rides on our performance screens and the portal. Operations is notified of late arrivals or customer delays. Drivers must report events to our dispatch agents to prevent excessive late response times. Butterfli's technology books ride using smart logic to ensure there is adequate time for travel, traffic, or unique customer circumstances, such as patients who may require extra assistance that requires additional time.

Our operations team is responsive to the customer's needs, aware of ride activity, and works to ensure on-time performance.

Butterfli's current performance with Los Angeles Metro is 95% on-time response time. We anticipate a similar response time for San Diego AFA. The current percentage of rides that are WAV is 67%, meaning 67% of customers have wheelchairs. However, 100% of the vehicles used for Los Angeles AFA are WAV vehicles. With the exception of possible services performed by Uber or Lyft, the vehicles used for SD AFA will be WAVs.

Los Angeles County Metro Access for All program has been very successful. Here are some statistics for August 2023 through May 2024:

- Total number of rides per weekday 120 to 230
- Average number of rides per month 1,700 to 2,200
- Over 11,000 provided as of June 14, 2024
- Overwhelming demand for current supply. 95% of the time, we reach supply capacity for available ride times.

- D. Describe the Applicant's proposed methodologies and procedures for ongoing monitoring and evaluation of the project's effectiveness in providing on-demand WAV service. What steps will be taken if the Applicant's original goals are not achieved?

Butterfli has a proven methodology and procedures for monitoring and evaluating the project's effectiveness in providing on-demand WAV service. We regularly review and perform audits, as well as service levels, customer service, and ride activity. This is a description of our review and monitoring for the operation:

Customer Engagement and Call Center Operations

- Full-service customer engagement operations with supervisors on duty
- Provide scripts specific to the client's needs- updated as needed
- Representatives are trained and receive refresher training as needed
- Regular agent phone monitoring and skills and performance evaluations
- Phone call recording and review. Calibrations with operators
- Consistent real-time monitoring of the phone system and review of calls and reports
- Weekly performance evaluations for agents based on phone stats and public feedback
- Regularly review and update processes and procedures based on trends and changes
- Regular training on technology features. Regular review of tech performance and consistent improvements to the portals and applications to enhance services
- After-hours on-call operators assigned for off-service hours and 24-hour voicemail. Emergency on-call operators are available.
- Experienced supervisors and managers who manage the daily operation
- Daily review of Butterfli system data for performance
- Daily report review for ride activity
- Daily reconciliation of rides performed
- Conduct regular customer and client surveys for feedback and evaluation

Ride Service

- Regular service reviews with providers to ensure high-performance levels
- Require regular safety and driver training
- Review ride activity from the data reports and work with providers to identify performance issues
- Review real-time data on the system to identify performance issues
- Track ride activity on the portals and screens to ensure on-time performance.
- System provides notifications for late pick-up/arrivals and for off-route vehicles
- System provides activity reports and notifications for each touchpoint and ride activity
- Compliance specialists conduct safety checks, vehicle inspections, and rider security while vehicles are in service in the field.
- Gain Rider feedback for performance and service to improve the rider's experience

Vehicles and Maintenance

- Providers must comply with compliance onboarding to ensure transportation providers meet requirements. The Company, Vehicles, and Drivers must be verified to participate as a provider for Butterfli.
- Providers must pass internal maintenance and an external 3rd party vehicle inspection for vehicles in service for Butterfli on a regular schedule.
- Butterfli regularly audits providers files.
- The technology administrative portal maintains driver and vehicle records to keep the information updated and current.

A large, empty rectangular box with a thin black border, occupying the upper two-thirds of the page. It is intended for the applicant to provide a detailed explanation of their proposed service area and strategy to address existing gaps in WAV service.

- E. Explain how the Applicant's proposed service area will address existing gaps in WAV service where the need is greatest, including areas not adequately served by transit and paratransit. Describe the Applicant's strategy to provide on-demand service to directly address existing gaps in WAV service.

Our proposal team worked with our consultants and advocates to identify the following service areas for the San Diego AFA service: Vista, San Marcos, and Escondido and other outlying cities within 10 miles of these cities. These cities were selected based on research and data collected from the County of San Diego that identified census for the poverty levels within the County.

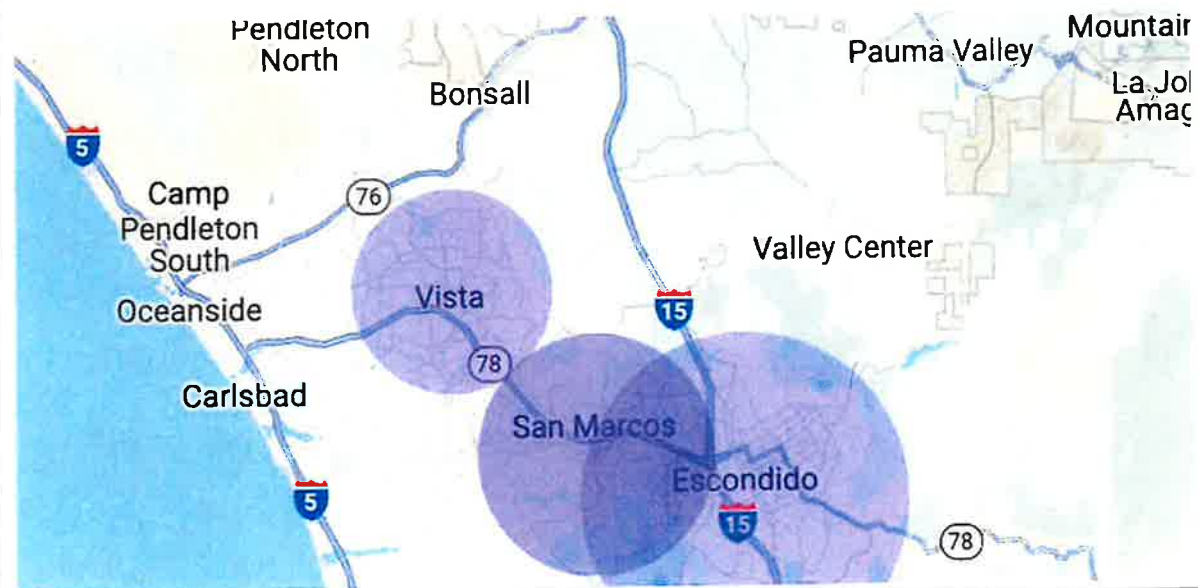
Butterfli also collaborated with our team of advocates and influencers that have knowledge about services and disparity in assisted transportation to get feedback regarding services and disability needs within these cities. These 3 cities met the criteria for underserved area, low income and high poverty rating, lack of services, and were in a central clustered area which meets the criteria for our program model for San Diego AFA given limited funding available. See Service Area Map below.

One of the primary objectives is to provide services to fill gaps in the current service available for customers. Butterfli has selected areas that we identified as having gaps in service due to lack of WAV supply or not adequately served by transit and paratransit.

The approach to this is to ensure we connect with local disability and public service groups to identify and target groups and locations that are underserved due to lack of resources, programs, income or other factors related to their disability such as age and intellectual challenges.

Butterfli's script for callers requires the customer to identify that they meet the requirements to participate in the program. First, the customer must state that they have a qualifying disability, and that they need assistance traveling because of limited physical mobility or intellectual disability. The customer must also identify if they use a mobility apparatus such as a walker, cane, or wheelchair or other mobility devise.

Butterfli continues to work with advocates, and local officials to ensure we target groups and organizations that have need for the services provided for the AFA program. This ensures that we allow a fair and equal opportunity for riders with the greatest need for the service.



5. Project Budget and Cost Efficiency

- A. Provide a proposed project budget using the Project Budget Template provided with the Call for Projects that aligns with the tasks in the Project Scope of Work.
- B. Describe the Applicant's methodologies and procedures for ongoing monitoring and evaluation of the service's cost efficiency. What steps will be taken by the Applicant to ensure the services provided are cost-effective?

The Budget Template is included as an attachment to this document.

Butterfli's management team works with the client to ensure we deliver the most cost-effective services. Our financial and management teams review financial reports and data together to identify expenses that can be adjusted to achieve the most cost-effective outcome. This includes reviewing staffing and provider costs and adjusting as needed.

Butterfli presents this program fee structure with a per-vehicle-hour rate for the transportation providers. This allows the opportunity for multiple riders for rideshare and ensures greater availability for on-demand ride performance. We find this model to be effective and results in the highest level of performance with minimal delays in on-time service.

It is Butterfli's goal to meet the community's needs and we are willing to shape the program based on SANDAG's budget and overall program allocation. This grant funding request amount is based on the amount of available funding. This project can be scaled to meet the grant award amount.

- C. Please describe efforts that have been or will be made to diversify and pursue funding from

sources other than the AFA program, including developing the capacity to fund the project beyond the Grant Term.

Butterfli is an assisted transportation administrator who consistently seeks funding sources for these programs. It is a private company that works with organizations and investors interested in funding programs like AFA. Butterfli will continue to seek funding sources, including funds within the City of San Diego allocated for Senior Transportation and other outside sources.

6. Innovation

- A. Describe any creative solutions or innovations in your project that address existing needs or barriers which could be applied to other services in the region or for other AFA programs across the state.

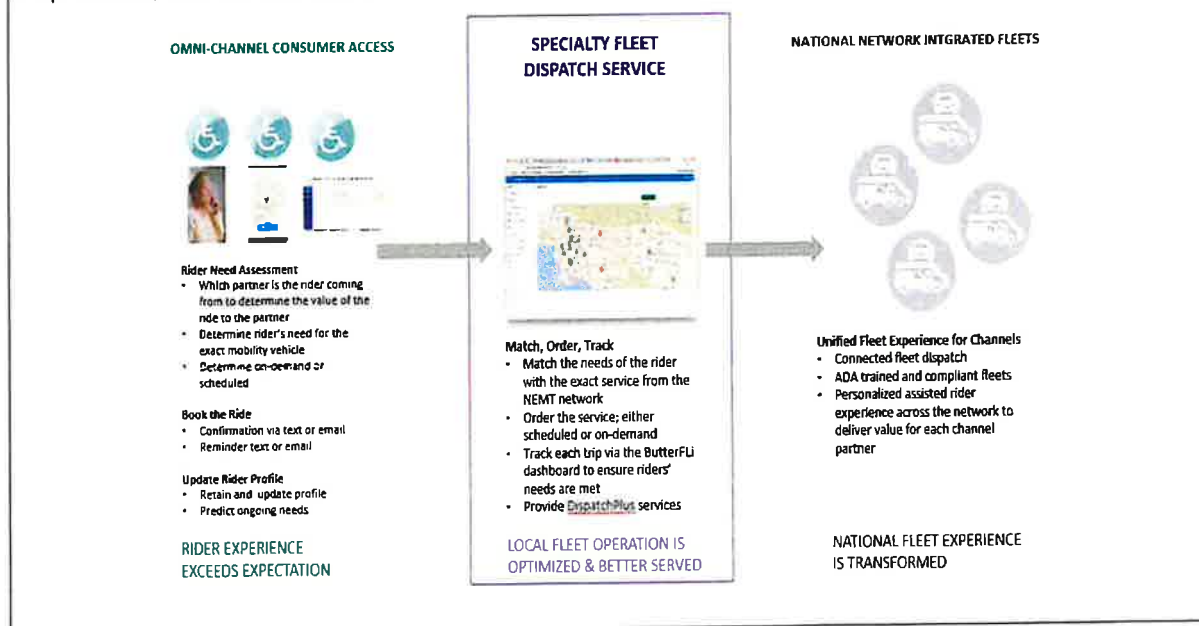
Butterfli's creative approach to the Los Angeles AFA program includes innovation in that our technology platform was enhanced to include features specifically for AFA. The ridership is unique with specific technological needs. For example, our technology team developed a route system that is unique to the type of service provided for AFA. New features were added to collect rider information (non-HIPPA), and customer notes regarding safe travel for the customer.

The technology was enhanced to include a feature that alerts our dispatch team if a ride veers off the scheduled route. This assists our team in ensuring safe travel for the passengers. Our tech application also provides notifications throughout the ride, allowing the customer and coordinators to track the ride and receive updates to their smartphones via SMS text.

Butterfli improved the client experience by enhancing our client portal, which allows organizations to book rides for their customers and consumers. This portal also tracks rides, reports, real-time notifications, updates, and alerts. The system also allows passengers to book a ride online through the Butterfli website, which includes full program information, maps, program guidelines, and other details about AFA.

Our marketing, outreach, and digital media partner delivered innovative digital materials and received the prestigious "NETTY" Award in April 2024. The award was for digital marketing for their innovative approach to accessible transportation in Los Angeles County. The impact of the work resulted in 15k visits, 13k social media impressions, and 10k ride bookings! We are pleased to have this group as our partners for Los Angeles, and they will work with us for San Diego AFA as well.

The messaging for the Los Angeles AFA program, the technology, and our dedicated trained management, staff, and provider drivers have resulted in the best, most innovative customer experience, and we are very proud of the success.



- B. Does the project include any efforts at ensuring environmental sustainability, such as grouping

trips and use of alternative fuels or clean air vehicles? Describe in the space below.

Butterfli is committed to clean air by using alternative fuels. We are excited to explore the options with our transportation providers urging them to utilize these methods and vehicles. Butterfli intends to purchase one clean energy vehicle to be used for SD AFA upon approval of funding.

Butterfli understands that ride-sharing is a great alternative for limiting vehicle usage, which results in lower emissions. Should San Diego AFA approve and accept ride-sharing, Butterfli will implement this into our business model.

Required Forms for All Applicants

Applicant Statement Form

Please indicate application completeness by checking the following boxes and sign and date below.

As an authorized delegate, I certify that my agency:

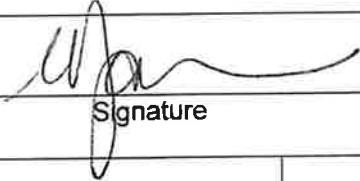
- ☒ Has read the Grant Agreement Template and accepts and can meet the terms and conditions therein.
- ☒ Understands that SANDAG will not reimburse the applicant for expenses incurred prior to issuance of the Notice to Proceed or after the grant term expiration.

If this application is approved for funding, I certify that my agency:

- ☒ Understands the responses in this application will become requirements reflected in the Grant Agreement with SANDAG.
- ☒ Agrees to sign and return the Grant Agreement to SANDAG, without exceptions, within 45 days of receipt.
- ☒ Will submit progress reports, performance measures, and invoices documenting the use of both grant and matching funds to SANDAG no less frequently than quarterly using the method required by SANDAG.
- ☒ Will set-up a separate project account that will be in accordance with a quarterly reporting and invoicing schedule.

I certify that I agree with the above statements and that the information submitted in this application is complete, accurate, and in accordance with these guidelines.

I have the authorization to submit this Grant Application on behalf of my agency.

		6/13/2024
Signature		Date
Gerri Willis	Chief Operating Officer- Butterfli	
Printed Name	Title	

Public Contract Code Section 10162 Questionnaire

In accordance with Public Contract Code Section 10162, the Applicant shall complete, under penalty of perjury, the following questionnaire:

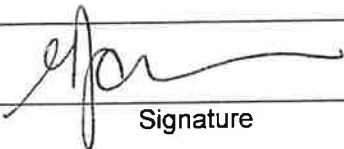
Has the Applicant, any officer of the Applicant, or any employee of the Applicant who has a proprietary interest in the Applicant, ever been disqualified, removed, or otherwise prevented from bidding or proposing on, or completing a federal, state, or local government project because of a violation of law or a safety regulation? **NO**

☒ Yes*

☐ No

*If the answer is yes, explain the circumstances in the space below.

--

 Signature	<i>6/13/2024</i> Click or tap to enter a date. Date
--	---

Geri Willis Printed Name	Chief Operating Officer Title
-----------------------------	----------------------------------

Public Contract Code Section 10232 Statement

In conformance with Public Contract Code Section 10232, the Applicant hereby states under penalty of perjury, that no more than one final unappealable finding of contempt of court by a federal court has been issued against the Applicant within the immediately preceding two--year period because of the Applicant's failure to comply with an order of a federal court which ordered the Applicant to comply with an order of the National Labor Relations Board.

 Signature	6/13/2024 Date
--	-------------------

Geri Willis Printed Name	Chief Operating Officer Title
-----------------------------	----------------------------------

Equal Employment Opportunity Certificate

Applicant hereby certifies that it will comply with the provisions of the SANDAG Equal Employment Opportunity Program ([SANDAG Board Policy No. 007](#)), and rules and regulations adopted pursuant thereto, Title VI of the Civil Rights Act of 1964, the California Fair Employment Practices Act, and any other applicable federal and state laws and regulations relating to equal employment opportunity, including laws and regulations hereinafter enacted.

Furthermore, Applicant hereby certifies that it: **Has Not**

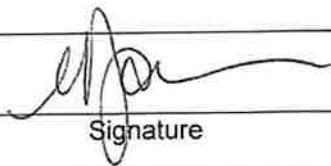
☒ Has*

☐ Has Not

been found, adjudicated, or determined to have violated any laws of Executive Orders relating to employment discrimination or affirmative action including, but not limited to, Title VII of the Civil Rights Act of 1964, as amended, (42 U.S.C. 2000[e] et seq.); the Equal Pay Act (29 U.S.C. 206[d]); Executive Order (EO) 10925 (Kennedy, 1961), EO 11114 (Kennedy, 1963), or EO 11246 (Johnson, 1965); or the California Fair Employment and Housing Act (Government Code 12460 et seq.); by any federal or California court or agency, including but not limited to the Equal Employment Opportunity Commission, the Office of Federal Contract compliance Programs, and the California Fair Employment and Housing Commission.

*If Has is marked above, please explain the circumstance in the space below.

--

 Signature	6/13/2024 Date
--	-------------------

Geri Willis Printed Name	Chief Operating Officer Title
-----------------------------	----------------------------------

Safety Protocol Declaration Form

Carrier Name (Access Provider)	Butterfli Technologies Inc.
PSG # (if applicable)	

Pursuant to [Decision 21-11-004](#) Ordering Paragraph 12, all eligible Access Providers must comply with the following Safety Protocols:

- **Background checks:** Access Providers must perform background checks that meet or exceed what is required for a TNC under the Instructions for TNC Application Form.¹
- **Insurance:** Access Providers must have levels of insurance that are equivalent or higher than what is required for charter-party carriers under General Order 115.² Please refer to the Sample Grant Agreement in the Call for Projects for more information on insurance requirements.
- **Driver training:** Access Providers must have certification that their drivers have completed WAV driver training on transporting people with disabilities within the past three years including but not limited to the following:
 - Sensitivity training
 - Passenger assistance techniques
 - Accessibility equipment use
 - Door-to-door service
 - Safety procedures
- **Controlled substance and alcohol testing:** Access Providers must be enrolled in a controlled substance and alcohol testing program.
- **Secretary of State registration:** Access Providers must have their articles of incorporation filed with the Secretary of State.
- **Motor Carrier Profile with CHP:** Access Providers (unless an exempt Social Service Transportation provider) must complete the California Highway Patrol (CHP) 362 Motor Carrier Profile and obtain a CA Number from the CHP.
- **Inspection:** Access Providers must have certification that all WAVs have been inspected and approved to conform with the American with Disability Act Accessibility Specifications for Transportation Vehicles within the past year, including the "19-point" vehicle safety inspection as required in both the TCP³ and TNC⁴ permitting process.

In addition, pursuant to [Decision 21-03-005](#) Ordering Paragraph 22, Access Providers offering wheelchair accessible vehicle services shall place the International Symbol of Accessibility on vehicles providing WAV service in the following locations: passenger side door (below door handle) and rear of vehicle (right side above bumper).

Access Providers shall be responsible for ensuring compliance with these requirements and shall

¹ Basic Information for Transportation Network Companies and Applicants at 4.

² General Orders are available online at <https://www.cpuc.ca.gov/generalorders/>

³ General Order 157-E at 9: <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M322/K150/322150628.pdf>

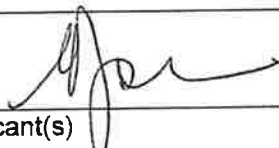
⁴ [Basic Information for Transportation Network Companies and Applicants](#) at 9 and 10.

maintain records of such compliance if applicable for the duration of the program, which is scheduled to sunset on January 1, 2026. The CPUC and/or SANDAG may request supporting documentation at any time.

CERTIFICATION

I (we) certify (or declare), under penalty of perjury, that I (we) have read and understand the above requirement and must have completed the safety protocols above, and that I (we) am (are) to and will comply with it. I (we) certify (or declare), under penalty of perjury, that the foregoing is true and correct.

6/13/2024	Geri Willis
Date	Print Name of Applicant/Officer


Signature of Applicant(s)


Signature of Corporate Officer

Chief Operating Officer
Title of Corporate Officer

Required Forms for TNC Applicants Only

TNC As Access Provider Attestation Form

TNC Name	N/A
PSG #	

Pursuant to [Decision 21-11-004](#) Ordering Paragraph 14, all Transportation Network Companies (TNCs) applying as an Access Provider must attest to the following:

- New Service Exception: For the purpose of Access Provider eligibility, a TNC is eligible to serve as an Access Provider in a geographic area so long as it has not provided wheelchair accessible vehicle (WAV) services in that geographic area since July 2019.⁵
- Exemption Exception: For a TNC that has operated WAV services since July 1, 2019 in a given geographic area, the TNC may continue to be eligible as an Access Provider in that geographic area if it qualifies under the exemption exception, which states the following:
 - A TNC may be eligible as an Access Provider in a geographic area where it currently offers WAV service if:
 - a) the TNC qualifies for an exemption in that geographic area, and
 - b) the TNC certifies that the TNC's collected fees during the Exemption Year were exhausted to provide WAV services.⁶

Please check one of the following:

I confirm the TNC stated above qualifies as an Access Provider under:

☐ New Service Exemption

☐ Exemption Exception

⁵ Decision D.21-11-004 Ordering Paragraph 4: a TNC is deemed to "operate WAV service" in a given geographic area if the TNC completes at least one WAV trip that originates in that geographic area.

⁶ See D.21-03-005 OP11.

TNC As Access Provider Attestation Form (Continued)

CERTIFICATION

I (we) certify (or declare), under penalty of perjury, that I (we) have read and understand the above requirement, and that I (we) confirm the above requirement. I (we) certify (or declare), under penalty of perjury, that the foregoing is true and correct.

Click or tap to enter a date.

N/A

Date

Print Name of Applicant/Officer

Signature of Applicant(s)

Signature of Corporate Officer

Title of Corporate Officer

PROPOSAL ATTACHMENTS

SANDAG- San Diego Access for All Project Grant Funding

ATTACHMENT # 1: Sample Program Collateral Material

ATTACHMENT # 2: Transportation Provider Compliance Checklist

ATTACHMENT # 3: AFA Transportation Provider Readiness Checklist

ATTACHMENT # 4: Driver Training Checklist

ATTACHMENT # 5: 3rd Party Maintenance Vehicle Inspection Form

ATTACHMENT 1



Access for All is a program that provides assisted transportation to individuals who need a **WAV (Wheelchair Access Vehicle)** vehicle to accommodate limited mobility or other limitations. The service operates in several zones in Los Angeles County. Butterfli operates the service.

This program is to provide service to people with disabilities, especially those with wheelchairs.

[Book A Ride](#)

[Find Your Promo Code](#)



How It Works



Download the App

You can find us on the App Store and the Google Play Store @Butterfli Passenger

[App Store](#)

[Google Play Store](#)



Book Online

Click below to reserve a ride through the website

[Book A Ride](#)



Call Us

Call us at (855) 301-1624 to book your ride

[Call Us](#)



Contact a Community Partner

Contact a **Community Partner** and let them know you would like to request transportation with Butterfli

[Find Community Partner](#)

[Find Your Promo Code](#)

ATTACHMENT 2

TRANSPORTATION PROVIDER CHECKLIST

for METRO ACCESS FOR ALL

TRANS PROVIDER:

CONTACT PERSON:

CONTACT INFO:

TASK/ITEM	Due Date	Completed/Status
Signed Contract Agreement- Copies emailed		
On-Site Vehicle Inspection Completed		
Vehicle Decals/Wrap Inspected and Approved		
Driver Training Sheet Received for each Driver New drivers added as needed		
Maintenance Records Received for each Vehicle Must be within last 60 days		
Confirmed Daily Vehicle reporting Process Daily Pre/Post trip Reports maintained by company 3 years		
Driver Certifications Validated LADOT Permit, Valid CA Drivers License, DMV Pull Notice, CPR Cert, First Aid Cert., Medical Card		
Validated and Approved Safety Program		
Dispatch/Logistics/Admin Trained on BFLi Portal Need list of staff trained and date		
Drivers Trained on BFLi App Need list of drivers, training date		

ATTACHMENT 3



Metro Driver Readiness Checklist

Company Name:

Contact Name:

Contact Number:

Email Address:

Driver Name:

CDL#:

Exp Date:

Chk	Item/Requirement	Other Info
	Copy of Current CDL Exp Date: Over 3 Yrs: Yes No Confirmed less than 3 Violations: Yes No CDL Class: A B C	
	Enrolled in DMV Employer Pull Notice Program Date: Need a copy of printout of the employee's report	
	Cleared Drug Test Results Date: Drug testing facilities must be approved-Must be FTA/DOT Drug testing Employee Enrolled in Random Drug Test Program:	
	Copy of Valid Current Medical Card, Exp Date:	
	Copy of dated signed Training Form Date completed:	
	Must pass on-site vehicle inspection (will review drug testing) Copy of LADOT permits, driver and approval letter from LADOT	
	Signed Acceptance of maintenance requirements	
	Signed Internal safety policy	
	TP and driver has complete AFA training: driver app, TP portal	

Driver Signature: _____

Date: _____

TP Signature: _____

Date: _____

ButterFLi Signature: _____

Date: _____

ATTACHMENT 3

Each item on this list for Pre-Start and Internal must be checked as completed before starting service for each driver. Please have each driver participating in the program complete a separate form.

The list below is for ButterFLi to complete, we will send a signed completed copy when we have received everything.

ButterFLi INTERNAL INFORMATION CHECKLIST:

Chk	Item/Requirement	Other Info
	Signed Contract Agreement- Copies emailed	
	On-Site Vehicle Inspection Completed	
	Vehicle Decals/Wrap Inspected and Approved	
	Driver Training Sheet Received for each Driver	
	New drivers added as needed	
	Maintenance Records Received for each Vehicle	
	Must be within last 60 days	
	Confirmed Daily Vehicle reporting Process	
	Daily Pre/Post trip Reports maintained by company 3 years	
	Driver Certifications Validated	
	LADOT Permit, Valid CA Drivers License, DMV Pull Notice, CPR Cert, First Aid Cert., Medical Card	
	Validated and Approved Safety Program	
	Dispatch/Logistics/Admin Trained on BFLi Portal	
	Need list of staff trained and date	
	Drivers Trained on BFLi App	
	Need list of drivers, & training date	

ButterFLi Signature: _____

Date: _____

ATTACHMENT 4

Metro AFA Driver Training

Driver Name: _____

Completion Date: _____

Transportation
Provider _____

Next Training Update _____

Date	Butterfli Required Driver Training	Instructor Initials
	Transporting Passengers with Disabilities	
	Interacting with Passengers	
	Diffusing Conflict	
	Sensitivity Training	
	Passenger Safety and Care While Loading and Unloading	
	Mobility Aids and Devices	
	Service Animal Training	
	Harassment Prevention	
	Reporting of Accident/Incident (Timeline required) Form 2 hour reporting requirement	
	HIPAA/Passenger Information Confidentiality	
	Drug and Alcohol Policy Training (Video Link)	
	Defensive Driving	
	Pre and Post-trip DVIR	
	Blood Borne Pathogens	
	Verified Credentials, Drivers License, CPR, First Aid, DMV Pull Notice, Background Check, Drug Alcohol Pass, LADOT Permits	
	Review Accident Incident Report Form	

Driver Signature: _____

Date: _____

Manager's Signature: _____

Date: _____



Subcontractor
Initial and Monthly
Vehicle Inspection Report

Condition Codes
☒ Item no defect
☐ Item Requires Repair
☐ Item Requires Adjustments
N/A Not Applicable

Unit _____ Mileage _____ Date _____ VIN _____

Item	Condition	Corrected	Item	Condition	Corrected	Item	Condition	Corrected
1. Interior			4. Exterior			6. Engine Compartment		
a. Driver's Seat — Belts / Condition			b. Flashers / Turn signals			a. Engine oil level		
b. Shift Selector Operation			c. Reflectors			b. Transmission fluid level		
c. Speedometer			d. Wipers / Washers			c. Radiator/Reservoir coolant level		
d. Panel Lights & Gauges			e. Mirrors			d. Power steering fluid level		
e. Horn operation			f. Clearance Lights			e. Charging system		
f. Steering Column Adjuster & Locks			g. Stop Lights			f. Fan belt condition		
g. Heater / Defroster Operation			h. Headlights			g. Wires, lines, hoses		
h. Wiper / Washer Operation			i. Tail Lights					
i. Radio Operation			j. License Plate Light					
j. Safety Equipment (Fire ext, triangles)			k. Reverse Lights / Alarm					
k. Current Registrations			l. Axles & Wheel Nuts					
l. Sun Visors			m. Windshield, windows, glass					
m. Interior Mirrors			n. Body Damage					
n. Interior Lighting			o. Paint & Decal Condition					
o. Passenger Signals			5. Undercarriage					
p. Seats & Armrests			a. Engine leaks					
q. Floor Covering			c. Transmission leaks					
r. Windows & Emergency Exits			d. Motor mounts					
s. Climate Control, HVAC			e. Exhaust System					
2. Door Operation			f. Shock Absorbers / Struts					
a. Door hinges, bushings, tracks			g. Steering components					
b. Door locks and handles			h. Front suspension components					
3. Wheelchair lift			i. Rear suspension components					
a. Exit Door Operation			j. Drive line, U-joints, CV Axles					
b. Cycle W/C lift			k. Mud flaps					
c. Check all panels / linkage			l. Tire wear & condition					
d. Inspect hoses / fittings / cylinders			m. Differential fluid level & leakage					
e. Brake & Accelerator Interlock			n. Fuel tank, leaks, securement					
f. Tie down condition and quantity			o. Wires, lines, hoses					

Tire Tread Depth Measurements in 32nds		Comments	
LF		Item #	Description
RF			
LRO			
LRI			
RRO			
RRl			

7. Vehicle Cleanliness / Aesthetics Requirements			
	Item	Condition	Corrected
a)	Carpets, floors and upholstery dry and free of dirt, debris, stains, rips, or holes		
b)	Dashboard clean and free of cracks		
c)	Seatbelts clean and fully operational		
d)	Interior free of any unpleasant or overpowering odors		
e)	Clean inside of all windows, removing all dust, fingerprints and head prints		
f)	Doors and armrest clean		
g)	Crevices clean and free of debris		
h)	Operator identification properly displayed and easily viewed		
i)	Client placard visibly displayed		
j)	Removal/repair of graffiti damage		

First Transit Representative (Print Name) _____ Subcontractor Representative (Print Name) _____	First Transit Signature _____ Subcontractor Signature _____
Date _____	Date _____

Attachment #5