



Agenda Item No. 3

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Memorandum

TO: MCAC Environmental Justice/Lifeline Subcommittee

DATE: February 21, 2008

FR: Jennifer Yeamans

W. I.

RE: Lifeline Transportation Program Evaluation

This memo provides an overview of the key findings from the interim Lifeline Transportation Program evaluation and summarizes the proposed recommendations the evaluation will provide in light of these findings.

At your last meeting, staff provided you with background information about the evaluation of the FY 05/06–07/08 Lifeline Transportation Program currently under way. This three-year funding cycle was intended as an interim program prior to the availability of long-term funding identified for the program in the region's Transportation 2030 Plan beginning in FY 2008. Under the program guidelines adopted by the Commission in December 2005, the interim program's \$18 million is being administered locally by the nine Bay Area county congestion management agencies (CMAs) or other designated county agency, via funding targets based on each county's share of the regional poverty population. The program guidelines called for an administrative evaluation of the program at the end of the three-year cycle to report on the results of the program and recommend future funding and programmatic oversight for the program.

The rationale for local administration of the Lifeline program was that the CMAs were already engaged in local needs assessment in communities of concern through their oversight of the Community Based Transportation Plans. Moreover, several counties have access to local transportation funds from county sales taxes with which Lifeline program funds could be augmented or exchanged as necessary to maximize the flexibility of program funds.

Evaluation Findings

The evaluation identified several challenges with the interim Lifeline program's administration. Overall, the flexibility hoped for in pooling several different federal and state funding sources regionally to fund the nine counties' programs created a very complex and cumbersome fund delivery process, with the result that some projects (but not all) have been slow to receive contracts and funding. The main source of this complexity lay in the very different requirements between various federal and state fund sources as to who can receive these funds and exactly what kinds of projects are and are not eligible under each funding source.

Some of the delay in delivering funds could not have been avoided given the specific schedule of program fund sources such as the Federal Transit Administration's Job Access and Reverse Commute program. Some of the delays, however, resulted from MTC and CMA staff

- more -

Agenda Item No. 3

encountering unexpected issues with certain kinds of projects or project components being ineligible for any of the program's three funding sources. Nevertheless, most counties with the authority to do so were able to use their local transportation funds to overcome these limitations, in particular by funding fare assistance programs for low-income families and individuals that would otherwise have been ineligible for regional Lifeline funds.

The issue of project sustainability under the current program was raised by several transit operators consulted in the evaluation process. Sustainability was one of the five program criteria MTC required each county to include in its selection process, although individual counties were responsible for determining the weighting for each criterion. In particular, operators of fixed-route transit, especially those services on which many people depend for their basic mobility, prefer longer-range funding commitments than the interim Lifeline program's three-year horizon.

In general, data gathered from county program administrators, MTC staff, project sponsors, and other stakeholders suggest that there is ample local support for the program throughout the region on the part of CMA staff and boards, and satisfactory performance by the CMAs in their current administrative role. The evaluation found that the counties' project selection processes went smoothly overall, the projects selected met program goals, and the local administration of the program effectively leveraged coordination with the Community Based Transportation Planning process and local transportation dollars.

Evaluation Recommendations

Based on the evaluation findings, staff are initially recommending that the future Lifeline program continue to be administered locally by the county congestion management agencies (or other designated countywide agency) under policy direction from MTC, with the following changes that will be implemented over the next year:

1. Streamline fund allocation and delivery.

MTC will specify funding targets for each future program funding source (STA, Proposition 1B, and, where possible, JARC) by county to make the fund allocation and delivery process more clear and effective for all involved. It should be noted that Proposition 1B funds have already been assigned to each county based on poverty population per the terms and conditions set forth in MTC Resolution 3814, adopted in June 2007.

2. Revise program guidelines to make the project development process and fund eligibility clearer.

MTC will modify the program guidelines to specify more clearly what kinds of projects are eligible under the program's future funding sources: STA, Proposition 1B, and JARC. MTC will work with county administrators to develop fact sheets and other information to help project sponsors apply successfully for funds. In particular, the guidelines should more clearly indicate the process by which non-profits can apply for and receive funds. In determining how to address sustainability in their local project selection process, CMAs should work closely with local transit agencies to better incorporate the operators' ongoing needs and longer-term service plans into the process. In particular, the CMAs should consider allowing for multi-year funding commitments to these operators as deemed appropriate based on project monitoring.

3. Measure progress toward Lifeline goals.

MTC will work with CMAs and its advisory committees to develop regionally consistent project monitoring and evaluation criteria to incorporate into the Lifeline administration process. MTC will require and utilize data obtained from local project monitoring to quantify impacts of all Lifeline projects, irrespective of funding source, and track regional progress toward the goal of improving mobility for the region’s low-income families and individuals.

4. Pursue local mobility management strategies throughout the region.

Mobility management is a centralized system that matches people’s transportation needs with the resources available to serve them. It is intended to build coordination among existing public transportation and human service transportation providers with the goal of cost-effectively expanding the overall level of service for low-income people, seniors, and people with disabilities. Advancing mobility management in the region was a key strategy identified in MTC’s recently adopted Coordinated Public Transit–Human Services Transportation Plan. In addition, through Transportation 2035 discussions, MTC advisors have expressed interest in advancing mobility management locally throughout the region. Program guidelines will be revised to encourage funding for countywide mobility management.

5. Seek out new, more flexible funding sources.

MTC’s current Legislative Program includes state legislation to expand STA fund eligibility to incorporate fare assistance programs. The region should continue to explore new and more flexible funding to enable a greater variety of community based projects to be funded under the Lifeline program.

The following table summarizes how the proposed recommendations would change the existing interim Lifeline program going forward.

Recommendation	Interim Lifeline Program	Future Lifeline Program
1. Streamline fund allocation and delivery	MTC assigned a lump-sum funding target to each county	Counties will receive a target for each funding source: Proposition 1B (already established in Res. 3814), STA, and (where possible) JARC
2. Revise program guidelines	Program guidelines encouraged a wide variety of projects; project eligibility for each fund source was outlined in the call for projects	Project eligibility under each fund source will be in the program guidelines
3. Measure progress toward program goals	Project applications required applicants to identify basic performance indicators and milestones	MTC will require such indicators for all projects and regionally track progress
4. Pursue local mobility management strategies	Eligible under existing program but not emphasized as a strategy	MTC will encourage development of local strategies based on findings in MTC Coordinated Plan
5. Seek out more flexible funding	CMAQ, STA, and JARC funds enabled a variety of project types	New, more flexible funding source(s) would broaden the scope of possible types of projects beyond what is eligible under Proposition 1B, STA, and JARC