



METROPOLITAN  
TRANSPORTATION  
COMMISSION

Joseph P. Bort MetroCenter  
101 Eighth Street  
Oakland, CA 94607-4700  
TEL 510.817.5700  
TDD/TTY 510.817.5769  
FAX 510.817.5848  
E-MAIL info@mtc.ca.gov  
WEB www.mtc.ca.gov

## *Memorandum*

TO: Partnership Technical Advisory Committee

DATE: March 17, 2008

FR: Jennifer Yeaman

W. I.

RE: Lifeline Transportation Program Evaluation

MTC's Lifeline Transportation Program funds community-based projects that improve mobility for low-income people in the Bay Area. To date, the Lifeline program has funded a wide variety of locally prioritized projects, including transit operations, transit capital projects, community shuttles, pedestrian capital projects, auto programs, demand-responsive services, information and outreach projects, and fare subsidies for low-income people. The Lifeline program of 39 projects adopted in MTC Resolution 3788, Revised, is attached for your reference.

### **Background**

In December 2005, MTC established guidelines for the FY 2005/06–07/08 Lifeline Transportation Program. This three-year funding cycle was intended as an interim program prior to the availability of long-term funding identified in the region's Transportation 2030 Plan beginning in FY 2008. When the Lifeline program guidelines were adopted, MTC recommended the interim program's \$18 million be 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 also called for an administrative evaluation of the program at the end of the funding period to report on the results of the program and recommend future programmatic oversight.

The interim Lifeline program's \$18 million in funding consisted of three funding sources: \$4 million in CMAQ funds, \$6.6 million in large-urbanized-area JARC funds for which MTC is the designated recipient, and \$7.5 million in STA Regional Discretionary funds. Each county prioritized projects to meet their lump-sum funding target and then advanced their projects to MTC, where they were matched with an appropriate funding source.

### **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 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 CMAs effectively coordinated the program with their oversight of the Community Based Transportation Planning process as well as availability of 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. Specifically, 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.

<b>Recommendation</b>	<b>Interim Lifeline Program</b>	<b>Future Lifeline Program</b>
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 projects beyond what is eligible under Prop. 1B, STA, and JARC

**Timeline for Review of Draft Evaluation Report**

Staff anticipates the draft evaluation report will be available for review beginning the next few weeks. It will be reviewed by the Regional Welfare to Work Transportation Working Group in late March; by MTC's Minority Citizens Advisory Committee, the Partnership Transit Finance Working Group, and the Partnership Technical Advisory Committee in April; and by the Partnership Board at its next meeting. After incorporating stakeholder comments, staff anticipates presenting the final draft to the Commission in May, with the next call for Lifeline projects to occur in summer 2008.

**Lifeline Program of Projects (FY 2005-06 thru FY 2007-08)**

#	Project	Project Sponsor	Project Description	Lifeline Funding Sources (a)			TOTAL Lifeline Funding	Notes
				CMAQ	STA	JARC		
<b>Alameda County</b>								
1	AC Transit Hayward Service	AC Transit	Provide day and evening service on Lines 83, 86 and 386 seven days a week in Hayward and South Hayward	-		941,289	941,289	
2	Ashby BART Station/Ed Roberts Campus	City of Berkeley	Install a new ramp, staircase, pedestrian pathway, crosswalk, universally designed bus shelter and transit information kiosk and signage	1,386,000	-	-	1,386,000	
3	E. Lewelling Blvd Streetscape	Alameda County Public Works	Install pedestrian improvements in Ashland and Cherryland to improve walking access to buses, schools and businesses	2,000,000	-	-	2,000,000	(e)
4	Quicker, Safer Trip to Library	Oakland Public Library	Provide transportation to kindergarten students, teachers and parents from elementary and preschools by bus to the West Oakland Library	-	150,000	-	150,000	
5	Wheels Route 14 Service Provision	LAVTA	Provide transit from low-income central residential district of Livermore to downtown Livermore employment center and transit center	-	132,142	311,282	443,424	

<b>County Bid Target</b>				<b>4,995,831</b>
<b>Proposed Programming</b>	<b>3,386,000</b>	<b>282,142</b>	<b>1,252,571</b>	<b>4,920,713</b>
<b>Unprogrammed Balance</b>				<b>75,118 (c)</b>

#	Project	Project Sponsor	Project Description	Lifeline Funding Sources (a)			TOTAL Lifeline Funding	Notes
				CMAQ	STA	JARC		
<b>Contra Costa County</b>								
6	Low Income Access to Health Care	Tri Delta Transit	Provide transit service to East Contra Costa County residents to access jobs, County health care, community colleges and social service facilities	-	-	276,000	276,000	
7	Monument Community Shuttle	CCCTA	Provide new shuttle service within the Monument Corridor, with access to a local health care clinic, shopping and transit connections at a discounted fare.	-	466,428	58,084	524,512	
8	CCCTA Route 111 weekend service	CCCTA	Reinstate weekend bus service between the Concord and Pleasant Hill BART stations, providing access to employment, shopping and church	-	264,425	50,287	314,712	
9	Low-Income Middle School Student Bus Pass (West CC)	WCCTAC	Provide free monthly bus passes to 660 low-income middle school households in the West Contra Costa County Unified School District	-	183,750	-	183,750	(b)
10	Continued Service on Line #376/Richmond	AC Transit	Maintain transit service on Route 376, which provides late night service in Richmond and North Richmond with access to employment, BART and transit connections.	-	596,722	383,424	980,146	

<b>County Bid Target</b>				<b>2,279,120</b>
<b>Proposed Programming</b>		<b>1,511,325</b>	<b>767,796</b>	<b>2,279,120</b>
<b>Unprogrammed Balance</b>	<b>-</b>			<b>-</b>

<b>Marin County</b>								
11	Canal Street improvements to pedestrian access and safety	City of San Rafael	Install pedestrian access and safety improvements along Canal Street in the Canal neighborhood of San Rafael	240,000				Revised 9/26/07 (f)

<b>County Bid Target</b>				<b>492,290</b>
<b>Proposed Programming</b>	<b>240,000</b>	<b>0</b>	<b>0</b>	<b>240,000</b>
<b>Unprogrammed Balance</b>				<b>252,290 (c)</b>

<b>Napa County</b>								
12	Installation of Bus Shelters and Seating	NCTPA	Purchase and install bus shelters and seating at various VINE bus stops throughout Napa County		309,961	-	309,961	

<b>County Bid Target</b>				<b>309,961</b>
<b>Proposed Programming</b>	<b>-</b>	<b>309,961</b>	<b>-</b>	<b>309,961</b>
<b>Unprogrammed Balance</b>				<b>-</b>

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#	Project	Project Sponsor	Project Description	Lifeline Funding Sources (a)			TOTAL Lifeline Funding	Notes
				CMAQ	STA	JARC		
<b>San Francisco County</b>								
13	Outreach Initiative for Lifeline Transit Access	Tenderloin Housing Clinic	Effort to conduct outreach to low-income households to facilitate increased access to MUNI transit by increasing awareness of the Lifeline Fast Pass, a discounted monthly pass for low-income persons.	-	137,741		137,741	(d)
14	Muni Route 109/Treasure Island	MTA	Maintain late night and more frequent service during peak periods and on weekends between San Francisco and Treasure Island	-	346,875	178,125	525,000	
15	Muni Route 29 Service	MTA	Add additional buses Monday through Friday to improve reliability and relieve over-crowding.		421,222	525,000	946,222	Revised 9/26/07
16	Bayview Hunters Point Community Transport	Bayview Hunters Point Foundation for Community Improvement	Offer subsidized transportation (taxi scrip, guaranteed ride home and community shuttles) to health-related services and jobs for BVHP residents. Includes significant outreach about new transportation programs and community involvement during project evaluation.	-	346,830	578,049	924,879	(d)
17	Lifeline Fast Pass Distribution Expansion	MTA	Expand distribution of MUNI's Lifeline Fast Pass to better accommodate recipients during distribution times. The project includes both capital improvements and operating support.		219,334	-	219,334	Revised 9/26/07 (f)

<b>County Bid Target</b>				<b>2,753,176</b>
<b>Proposed Programming</b>	-	<b>1,472,002</b>	<b>1,281,174</b>	<b>2,753,176</b>
<b>Unprogrammed Balance</b>				-

#	Project	Project Sponsor	Project Description	Lifeline Funding Sources (a)			TOTAL Lifeline Funding	Notes		
				CMAQ	STA	JARC				
<b>San Mateo County</b>										
18	Ways to Work Loan Program	San Mateo County	Provide low-interest loans to help families with: the purchase of a reliable, safe automobile to get to work on time; repairs for their automobile; or car insurance.	-	-	250,000	250,000			
19	Public Transportation Workshops	City of South San Francisco	Develop a curriculum and present workshops to train low-income Spanish and English speaking individuals to effectively use public transportation.	-	20,270	33,783	54,052			
20	Transportation Reimbursement Independence Program.	Family Service Agency	Provide mileage reimbursement to volunteers transporting low-income seniors who have difficulty accessing public transit and/or Redi-Wheels, a no-cost service to low-income riders in order to address financial	-	250,000	-	250,000			
21	Transportation Assistance Program	San Mateo County	Purchase monthly bus passes and provide emergency taxi vouchers to low-income families and individuals (including youth and seniors).	-	220,000	30,000	250,000	(b)		
22	San Mateo Medical Center Bus	San Mateo Medical Center	Purchase of a small bus, for both transporting older adults from their homes to the San Mateo Medical Center for medical and dental appointments.	-	111,000	-	111,000			
23	Transportation Mobility Solutions	SamTrans	Provide enhanced and viable transportation mobility solutions for the low-income, elderly, and disabled population of the San Mateo County Coastside area.	-	250,000	-	250,000	Revised 9/26/07		
24	Fair Oaks Community Shuttle	City of Redwood City	Implement a pilot shuttle service to connect residents with necessary services.	-	-	129,488	129,488			
<b>County Bid Target</b>							<b>1,294,540</b>			
<b>Proposed Programming</b>							<b>-</b>	<b>851,270</b>	<b>443,271</b>	<b>1,294,540</b>
<b>Unprogrammed Balance</b>							<b>-</b>			

#	Project	Project Sponsor	Project Description	Lifeline Funding Sources (a)			TOTAL Lifeline Funding	Notes
				CMAQ	STA	JARC		
<b>Santa Clara County</b>								
25	Family Transportation Program	Outreach	Offers individualized transportation plans with flexibility to offer rides for entire family, as well as repair of personal vehicles	-	225,000	975,000	1,200,000	
26	Senior Transportation Program	Outreach	Provides older, minority seniors with a menu of transportation options.	-	750,000	-	750,000	
27	Ways to Work Family Loan Program	Family and Childrens Services	Provides unique car loan services with comprehensive case management	-	-	503,063	503,063	
28	Pedestrian Enhancement Project	City of Gilroy	Capital funding project to build sidewalks and a pedestrian bridge in Gilroy	323,000	-	-	323,000	
29	Auto Repair Assistance Program	City of San Jose	Provides auto repair assistance to low-income residents			75,000	75,000	Revised 5/23/07

<b>County Bid Target</b>				<b>3,956,550</b>
<b>Proposed Programming</b>	<b>323,000</b>	<b>975,000</b>	<b>1,553,063</b>	<b>2,851,063</b>
<b>Unprogrammed Balance</b>				<b>1,105,487</b>

<b>Solano County</b>								
30	Benicia Vehicle Loan	Benicia Community Action Council	Provides down payments for low-cost vehicles for specified low-income individuals. Funds will also provide required repairs for donated vehicles.	-	-	30,000	30,000	
31	Fairfield Transportation Assistance for Central Solano	Fairfield Community Action Council	Funds emergency taxi vouchers, as well as program management for the distribution of bus and limited gasoline vouchers.	-	-	38,000	38,000	
32	Industrial Park Shuttle	City of Benicia	Provides early morning and late night shuttle service connecting Benicia Breeze Rt. 75 with the Benicia Industrial Park and Fairfield/Suisun Transit System Rt. 40.	-	26,000	-	26,000	
33	Saturday Local Service	City of Dixon	Funds Saturday service within and beyond Dixon.	-	150,000	-	150,000	
34	Peak Service Route 50	City of Rio Vista	Initiates commuter service using small buses between Rio Vista and Fairfield.	-	25,000	-	25,000	
35	Kids Shuttle	Kids Xpress	Provides expanded dedicated children's shuttle service between home, childcare, and school.	-	-	90,000	90,000	

<b>County Bid Target</b>				<b>1,002,812</b>
<b>Proposed Programming</b>		<b>201,000</b>	<b>158,000</b>	<b>359,000</b>
<b>Unprogrammed Balance</b>				<b>643,812 (c)</b>

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#	Project	Project Sponsor	Project Description	Lifeline Funding Sources (a)			TOTAL Lifeline Funding	Notes
				CMAQ	STA	JARC		
<b>Sonoma County</b>								
36	Community Transportation Manager	Sonoma County	Addresses unmet transportation needs by developing advisory groups in low-income communities to expand existing transportation options and improve transportation choices		100,000	-	100,000	Revised 9/26/07
37	New Route 19	Santa Rosa CityBus	Provides new service connecting Roseland residents to shopping, jobs and the downtown Santa Rosa transit mall.		73,928	326,072	400,000	Revised 9/26/07
38	Hybrid Electric Buses for New Route 19	Santa Rosa CityBus	Funds new electric buses for the new Route 19, as well as for Route 12 to ensure on-time performance.		313,676	-	313,676	Revised 9/26/07
39	New Natural Gas Coaches for Intercity Routes Serving Sonoma County Low-Income Communities	Sonoma County Transit	Funds new coaches for Sonoma County Transit intercity routes serving low-income communities in Sonoma County.		335,000	-	335,000	Revised 9/26/07

<b>County Bid Target</b>			<b>1,148,676</b>
<b>Proposed Programming</b>	<b>822,604</b>	<b>326,072</b>	<b>1,148,676</b>
<b>Unprogrammed Balance</b>			<b>-</b>

**Regional Grand Totals**

<b>Lifeline Program Revenue Sources</b>	<b>4,045,000</b>	<b>7,569,862</b>	<b>6,618,094</b>	<b>18,232,956</b>
<b>Total Proposed Programming</b>	<b>3,949,000</b>	<b>6,425,303</b>	<b>5,781,946</b>	<b>16,156,249</b>
<b>Unprogrammed Balance</b>	<b>96,000</b>	<b>1,144,559</b>	<b>836,148</b>	<b>2,076,707 (c)</b>

- (a) Fund sources subject to change based on final determination of project eligibility.
- (b) Project type is not eligible for available fund sources. Therefore a fund swap with another agency will be necessary in order for project to receive funding.
- (c) Proposed projects need to consider funding sources available and their eligibility requirements
- (d) Fund source exchange will allow San Francisco Transportation Authority oversight
- (e) Project sponsor has requested a fund source exchange with local funds
- (f) Fund sources subject to change based on final determination on allowability of CMAQ transfer