

# Metropolitan Transportation Commission Programming and Allocations Committee

May 14, 2008

Item Number 5a

## Interim Lifeline Transportation Program Evaluation

**Subject:** Interim Lifeline Transportation Program Evaluation

**Background:** MTC Resolution 3726 adopted guidelines for the three-year interim Lifeline Transportation Program covering FY 2005-06 to 07-08. These guidelines recommended the interim program's \$18 million be administered locally by the nine county congestion management agencies (CMAs), and called for an administrative evaluation of the program to be conducted. This evaluation was to report on the results of the three-year interim program and recommend future funding and programmatic oversight for the program outlined in Transportation 2030 Plan. Through actions in June 2007 (MTC Resolution 3814) and January 2008 (MTC Resolution 3837), MTC confirmed and augmented its commitment to the Lifeline Program, resulting in a total 10-year estimated program of \$260 million.

Staff recently completed this evaluation in consultation with the CMAs, transit operators, MTC's Minority Citizens Advisory Committee, and other program stakeholders. The evaluation recommends the future Lifeline program continue to be administered by the CMAs or other designated countywide agency, with minor program changes to streamline fund delivery, strengthen performance measures, and make project eligibility clearer.

The executive summary is included as Attachment A. It outlines background information, key findings, and recommended changes to the existing interim program, summarized below:

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
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 specified 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

The full report is available on MTC's web site at  
<http://www.mtc.ca.gov/planning/lifeline/index.htm>.

**Issues:** Staff seeks input from the Committee on the evaluation's recommendations as new program guidelines are developed. Detailed program guidelines will be presented to the Committee at your June meeting for approval in anticipation of the next call for Lifeline projects occurring in late June.

MCAC has provided comments, which are included as Attachment B.

**Recommendation:** Information only. Staff will return in June 2008 with revised Lifeline program guidelines for Committee approval.

**Attachments:** Draft Evaluation Report: Executive Summary  
Minority Citizens Advisory Committee Memorandum

## Executive Summary

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This report presents the findings of an administrative evaluation of MTC’s interim Lifeline Transportation Program. The Lifeline program, currently implemented locally by the nine Bay Area county congestion management agencies (and jointly with the county in Santa Clara County) under policy direction from MTC, funds a variety of transportation projects throughout the region to benefit low-income people and communities. These projects are intended to address locally prioritized transportation gaps and barriers with new or expanded services, or improved transportation choices, which provide low-income people and communities a “lifeline” to accessing employment, services, and other activities that are considered essential to daily life. The Lifeline program has funded a variety of projects throughout the region based on locally prioritized needs, including fixed route transit, deviating-route shuttles, pedestrian safety improvements, taxi vouchers, demand-response programs, auto loan programs, and others.

This evaluation covers the FY 2005/06–07/08 Lifeline program, which was created prior to the availability of long-term funding that MTC committed to the Lifeline program in the region’s long-range Transportation 2030 Plan. Because this long-term funding was not anticipated to become available until FY 2008/09, MTC established the interim Lifeline Transportation Program to close this gap in timing and jump-start the program.

### Program Overview and Evaluation Context

In December 2005, MTC adopted Resolution 3726, which funded the \$18 million interim Lifeline program with \$4 million in federal Congestion Mitigation and Air Quality (CMAQ) funds, \$6.6 million in federal Job Access–Reverse Commute (JARC) funds, and \$7.5 million in State Transit Assistance (STA) funds. MTC established program guidelines to support community-based projects that:

- Are developed through a collaborative and inclusive process
- Address transportation gaps or barriers identified in locally based needs assessment
- Improve a range of transportation choices with new or expanded services

At that time, the Commission recommended that the interim program be administered locally by the nine Bay Area county congestion management agencies (CMAs) under policy guidance from MTC, with each county given a funding target based on its share of the region’s low-income population. The rationale for this administrative framework was that the CMAs were already overseeing the Community Based Transportation Planning program in the Bay Area’s low-income and minority communities, which identifies and prioritizes transportation needs at the local level. The Commission also called for an evaluation of the three-year program to be conducted prior to the next call for projects, to report on the results of the program and recommend future programmatic oversight for the program outlined in the Transportation 2030 Plan. This report presents the results of that evaluation.

Since the interim program’s inception, two other events have occurred that affect the Lifeline program’s long-term future, and thus impact this evaluation’s scope and its recommendations. In July 2007 and through a subsequent action in January 2008, MTC augmented the investment in

the Lifeline program with additional funding over the next 10 years: \$112 million in Proposition 1B infrastructure bond funds, \$10 million in spillover funds, and an estimated \$46 million in STA funds. With these commitments, and confirmation of STA revenue commitments identified in the Transportation 2030 Plan, revenue estimates for the Lifeline Program over the 10-year period beginning FY 2008–09 total \$260 million. This figure could be increased should federal JARC funding be continued beyond FY 2009.

In December 2007, MTC adopted the Coordinated Public Transit–Human Services Transportation Plan, a planning effort to coordinate needs assessment and service delivery strategies across low-income, elderly, and disabled populations. Under federal requirements, future JARC-funded Lifeline projects will need to be derived from this plan.

Thus, based on the history of the program to this point, the key questions for this evaluation are:

1. Should the CMAs continue to administer the Lifeline program?
2. Is the program addressing its stated goals, and do its funding sources support these goals?
3. What opportunities exist to coordinate regional mobility strategies based on the findings and recommendations of MTC’s Coordinated Public Transit–Human Services Transportation Plan?

## Methodology

To gather data most relevant to addressing the evaluation’s key questions, MTC staff relied on four primary data sources: documentation review, input from all the agencies responsible for or participating in the program, a survey of project sponsors, and consultation with other stakeholders familiar with the transportation needs of the Bay Area’s low-income population.

## Program Highlights

Highlights of the interim Lifeline program are as follows:

- \$16.1 million in Lifeline funds have been programmed for this three-year cycle, helping to fund projects and programs that total more than \$50 million in investment to benefit low-income people and communities. Lifeline funds made up 32% of the total amount of money invested in these projects.
- To date 39 projects throughout the region have been funded: 11 transit operating projects, 4 transit capital projects, 4 community shuttles, 4 pedestrian infrastructure projects, 4 auto-based programs, 5 demand-response services (such as senior and children’s transportation), 4 information and outreach projects, and 3 programs providing fare subsidies.<sup>1</sup>
- The largest share of funds went to transit operating projects (\$5.2 million), followed by pedestrian infrastructure projects (\$4 million), demand-response services (\$1.7 million), community shuttles (\$1.6 million), fare subsidies (\$1.2 million), transit capital (\$1 million), auto access programs (\$850,000), and information and outreach programs (\$500,000). Figure ES-1 shows the share dedicated to each type of project.

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<sup>1</sup> The three fare-subsidy programs were all funded via exchanges with local transportation funds, since they were an ineligible use for any of the regional Lifeline funding sources.

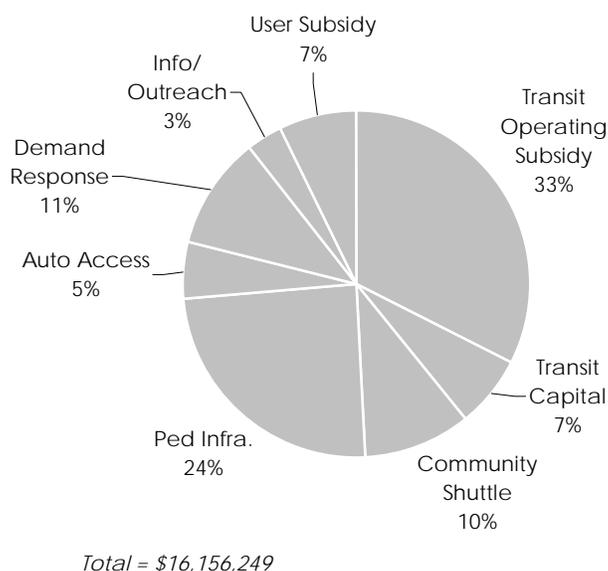


Figure ES-1. Programmed Lifeline funding by project type

- Marin, Santa Clara, and Solano Counties have unprogrammed balances totaling \$2 million, which are in the process of being programmed.

### Key Evaluation Findings

Based on the evaluation of the interim Lifeline program's administration, goals, and funding, the following key findings emerge:

- Overall, the CMAs performed satisfactorily in administering the Lifeline program locally. The call for projects and selection processes went smoothly, and the program's administration was well coordinated with the CMAs' oversight of the Community Based Transportation Planning program.
- Some barriers were encountered following approval of each county's program of projects. The flexibility intended in giving each county a lump-sum funding target resulted in a great deal of complexity in terms of matching and delivering funds regionally for all nine counties. Some of these issues can be addressed through program changes.
- Transit operators expressed the need for long-term funding commitments to sustain service. A key challenge faced by the program going forward will be how to balance the need for long-term, sustainable funding for ongoing projects on which many low-income people rely for basic mobility (such as fixed-route transit service) with the need to develop effective new solutions for low-income people and neighborhoods.
- Overall, the Lifeline projects selected appeared to meet program goals, but as the program matures over the next few years, more detailed project-level program evaluation will be required to assess specific progress toward these goals.
- The combination of funds available to the interim Lifeline program (CMAQ, JARC, STA) enabled a variety of community-based projects to address a wide range of transportation gaps and barriers. Funds available to the future Lifeline program (JARC,

STA, and Proposition 1B) will be slightly more limited in scope, particularly in that they will not be able to fund pedestrian capital projects that were an eligible use of CMAQ funds. As a result of these limitations, there will likely be a disconnect between the variety of local transportation solutions emerging from the Community Based Transportation Plans, and the ability of Lifeline program funds to deliver those solutions.

### Recommendations

Based on the evaluation findings, staff recommend 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 some changes that will be implemented in the next funding cycle. The following table summarizes staff’s recommendations and indicates how each 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
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 specified in the program guidelines
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*Memorandum*

TO: Programming and Allocations Committee

DATE: May 7, 2008

FR: Minority Citizens Advisory Committee

RE: Comments on Lifeline Program Evaluation Report

This past March, a subcommittee of the Minority Citizens Advisory Committee (MCAC) reviewed the Lifeline Program Evaluation Report and made recommendations to the full MCAC. MCAC discussed the subcommittee's recommendations at its April 2008 meeting, and agreed with the subcommittee's findings that the report is objective and thorough.

However, at the subcommittee's suggestion, MCAC voted to express two concerns with the Lifeline Program in general to the Commission.

1. MTC needs to measure improvements to low-income communities as a result of the Lifeline Program. Are the gaps in the transportation network being closed as a result of the program?
2. MTC should take a look at the pros and cons of administering the Lifeline Program at the regional vs. the local level. There needs to be some accountability at the county level.

Please note that while MCAC did take a vote and approved the language in this memo (motion passed 7 to 2), there was not a quorum present at the time the vote was taken.