

LIFT CYCLE 3 LOW INCOME FLEXIBLE TRANSPORTATION DRAFT PROGRAM EVALUATION

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EXECUTIVE SUMMARY

The following is an evaluation of the projects funded through Low Income Flexible Transportation (LIFT) funding program's third cycle. The LIFT program is a result of a partnership between MTC and local San Francisco Bay Area transit, social service, non-profit, and other local government agencies. MTC administered a program to respond to transportation challenges faced by low-income people. Funding for projects was shared between federal and state funding programmed by MTC and by local agencies. The evaluation examines the 12 individual projects in terms of ridership and utilization, efficiency, and outreach/coordination efforts. Moreover, this evaluation serves to examine the LIFT III program and its collective accomplishments in meeting transportation needs of low-income families in the Bay Area.

The report begins with an overview of findings reported from the LIFT Cycle I and LIFT Cycle II Evaluations. Background information regarding the origination of the LIFT program as well as its collaboration with welfare to work and community based transportation plans suggest that the LIFT program targets key transportation needs in low-income communities and aims to fulfill their needs through coordination with local agencies.

Cycle III is the final round of the LIFT program and is the predecessor of MTC's current Lifeline Transportation Program. The next section of the evaluation discusses the application process and Call for Projects. The MTC application gave requirements for matching and project eligibility. This section also includes the evaluation method used to choose projects. The selection criteria included: cost effectiveness of the project to meet the unmet transportation need, performance indicators identified by clearly defined goals and objectives for the program, project readiness for implementation., match, maximizing existing resources, sustainability beyond grant period, and other factors such as concentration of CalWORKS clients and other low-income persons in the project area, and potential usability by the general population.

Funding allocations and matches are included which supply graphs and information on families below the poverty level by county and funding by county, program type and sponsor type. Project funding was not allocated solely on the basis of low-income population, yet grant distribution by county closely matched low-income populations particularly in Alameda and Contra Costa counties. Projects funded were mostly Flexible Route/Demand Response yet projects also included Fixed Route, Auto Programs, and Mobility Management. Funding agreements and reporting requirements give information regarding the performance measurement which would be used for individual projects. Notably, projects were required to perform Quarterly Performance Reports which were based largely on Job Access and Reverse Commute (JARC) performance measurements.

Methodology for this evaluation consisted of a review of the required Quarterly Reports, results from an online agency survey which all project sponsors participated in, and interviews with project sponsors. A summary of LIFT projects is given which includes information on the project type, funding, match, duration, and status after the expiration of LIFT funding. Types of LIFT

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projects funded under Cycle III were fixed route, flexible route, demand-response, mobility management, and auto programs.

Evaluation results consisted of comparing evaluative criteria of the program with JARC performance measurements. Projects are compared on their ability to meet individual expectations of program sponsors, ridership or utilization, employment improvement, planning, outreach and evaluation, and sustainability. Notably, the projects with the highest levels of success were those that had the most coordination among relevant stakeholders.

The Program Administration section discusses the common barriers projects faced. Most projects had implementation and funding challenges. Other challenges included marketing and outreach efforts. Recommendations and key findings suggest that although there is no clear way to measure overall success of a program with such unique components, best practices of successful projects can be utilized in order to continually improve and measure similar types of low income transportation programs. Similarly, all projects continued at some level after the termination of LIFT funding. The MTC played an instrumental role mainly through the Lifeline Program in supporting these projects. The importance of the continued projects shows a commitment on the local level to maintain these projects. Individual descriptions and project evaluations are included near the end of the report.

The recommendations of this evaluation are listed below:

1. Program sponsors should be encouraged to identify a local mobility manager or transportation coordinator in their project applications who can provide coordination support.
2. Project sponsors should hold at least quarterly meetings between key stakeholders and partnering agencies in order to discuss project execution and alter program goals and expectations if necessary, in order to reach the target population and meet established expectations.
3. MTC should supply project sponsors with guidelines regarding best practices of similar project types.
4. Project sponsors should include a reasonable methodology for projecting service demands in their applications.
5. The qualitative aspect of projects needs to be assessed in evaluating project success for programs similar to the LIFT program.
6. MTC should conduct focus groups with sponsors of similar projects to discover and utilize best practices.

I. INTRODUCTION AND BACKGROUND

MTC's LIFT program focused on supporting projects that reduced or eliminated transportation barriers faced by low-income Bay Area residents. Through three funding cycles, MTC supported a total of 35 projects that aided the region's low-income population in seeking employment and other essential services. Examples of the types of projects that have been funded through LIFT include fixed-route transit, shuttles, children's transportation programs and auto maintenance subsidies.

Past Planning Efforts

The LIFT program has roots in the welfare reform legislation President Clinton signed into law in 1996, titled the Personal Responsibility and Work Opportunity Reconciliation Act. The California Work Opportunity and Responsibility to Kids (CalWORKs) program established in the following year requires all county welfare departments to provide necessary services for welfare recipients to obtain and retain employment as well as participate in related welfare-to-work activities. Since transportation is a key support service to these activities, social service and welfare departments have partnered with local transit agencies in order to plan these necessary access provisions.

The Metropolitan Transportation Commission (MTC), as the transportation planning, coordinating, and financing agency for the nine-county San Francisco Bay Area, provides assistance in organizing and encouraging transportation initiatives targeted at low-income populations in several ways. MTC funded and assisted each of the region's nine counties with the development of a countywide Welfare-to-Work Transportation Plan. These plans forged a connection between local social service and transportation providers in identifying and prioritizing a wide range of strategies for meeting the transportation needs of welfare and other low-income clients.

Welfare to Work Transportation Plans

MTC combined the counties' recommended transportation strategies into a Regional Welfare-to-Work Transportation Plan, completed in July 2001. The report revealed the region's demand for a comprehensive mapping of the transit routes. This map would be essential in supporting the travel patterns of low-income populations. MTC undertook this task, identifying routes based on four criteria: direct service to neighborhoods of highly concentrated CalWORKs residences; direct service to areas of highly concentrated essential destinations; trunkline service, as identified by the transit operator; and key regional linkage service. The findings of the comprehensive analysis were reported in the Lifeline Transportation Network Report, completed in December 2001. Contributing to all of these efforts through collaborative discussions, information-sharing, and advocacy for low-income transportation provisions, has been the Welfare-to-Work Transportation Working Group, comprised of transit and social service agency representatives, and hosted by MTC.

These planning efforts all concluded that transportation poses a significant barrier in attaining self-sufficiency. Commonly recommended programs to reduce transportation barriers included extending night and weekend fixed-route service, more frequent and reliable fixed-route service,

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accessible transit information resources, improved connectivity between transit, paratransit and demand response service, vanpools and ride-sharing programs, car-sharing programs, auto loan and repair programs, bicycle programs, bicycle and pedestrian infrastructure improvements, supervised walking programs or crossing guards for children, and mobility managers.

Community-Based Transportation Plans

In 2002, MTC launched the Community-Based Transportation Planning (CBTP) Program, which evolved out of two reports completed in 2001 — the *Lifeline Transportation Network Report* noted above and the *Environmental Justice Report*.

The Lifeline Report identified travel needs in low-income Bay Area communities and recommended community-based transportation planning as a manner in which communities could set transportation priorities and evaluate options for filling gaps in transit. Similarly, the Environmental Justice Report identified the need for MTC to support local transit planning efforts in low-income communities throughout the region.

Rather than identifying low-income transportation needs at a county level as established in the welfare-to-work transportation plans, the CBTP program focuses on a localized planning effort through which low-income community residents and the agencies which serve them can participate in a process to identify and prioritize transportation needs, as well as solutions to address them. CBTP Guidelines identify 25 Communities of Concern where community-based planning will take place. The plans are managed at the county level, through county Congestion Management Agencies.

LIFT Program History

LIFT Cycle I

The program began in 2000 with two federal funding sources - Congestion Mitigation and Air Quality and Surface Transportation Program Exchange funds. These monies were leveraged with the MTC's requirement that participating projects provide a dollar-for-dollar match. As a result, the \$10 million, three-year program to fund special projects for low-income transportation was born. Six of the projects expanded fixed-route service, two were new fixed-route services, three were demand-response, one was both expanded fixed-route and a demand response service, and another coupled expanded fixed-route with a mobility manager. Some projects were either terminated or continued at a reduced level of service. The majority of the first round of LIFT projects secured funding (in some cases from additional LIFT funding) to continue their services in full beyond the grant period.

The first cycle of the LIFT program did not include funding agreements, nor did it involve specified performance reporting criteria. Instead, project sponsors were only asked to specify in their application how performance would be measured, what would be measured, how often the project would be evaluated, and what steps would be taken if the project did not meet its specified targets. Comparison among the LIFT programs was difficult with the chosen performance measures. Obtaining the data necessary to provide the stated performance indicators proved to be extremely difficult for the project sponsors to obtain.

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An evaluation of the program completed in December 2003 made several recommendations for future project cycles:

- Adopt and explicitly state LIFT program goals while maintaining program flexibility;
- Improve application process to include standardized information allowing for consistent reporting of budget information, expected project outcomes, and other performance indicators;
- Revise screening and evaluation criteria, reexamining, in particular, the prioritization of new projects over continuing projects;
- Establish project-specific performance reporting requirements outlined in a funding agreement;
- Regularly report progress of the LIFT program to stakeholders;
- Conduct an annual evaluation of the LIFT program.

LIFT Cycle II

The second LIFT funding cycle commenced in 2002 and included \$3 million in State Transit Assistance (STA) (a state funding source) and \$3 million in federal Job Access Reverse Commute (JARC) funds. Due to a more difficult economic climate than in 2000, MTC lowered the match requirement to 20%, although over-matching was encouraged. Twelve projects were funded.

Although Cycle II of the LIFT program had already begun by the time the Cycle I evaluation was being conducted, many of the recommendations were incorporated into the program process. A funding agreement that listed project-specific quarterly reporting requirements was signed between MTC and each of the sponsoring agencies.

Key findings and recommendations from the second cycle of the LIFT program spanned the topics of program administration, project implementation, project selection, and societal sensitivity:

- LIFT funding should be available to continue projects no longer in the pilot phase, but unable to find funding elsewhere, so long as the project pursues efforts to be cost-effective and achieve independent sufficiency.
- Mobility managers are important for coordinating, planning and promoting transportation services for low-income individuals and funding restrictions on administrative caps should be lifted to allow for more of this type of project.
- Transportation services to social service buildings and employment support facilities were commonly funded with LIFT dollars. These transportation services were needed because the location of the service providers was not chosen to be a place accessible via public transit. Relocation of these services, or better coordination between social service and transportation agencies, might be considered as a sustainable way of providing access to them.
- Car sharing aimed at low-income clients likely needs to follow a different program model than that followed for recruiting members of the mainstream population.

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- Alternative, non-motorized methods of providing service should be considered before assumptions are made about transportation barriers always necessarily resulting from a lack of motorized transport, especially when considering children's transportation.
- Transit agencies should develop a method of acquiring data relating the success of the route at accessing job-supporting destinations.
- Coordination between agencies is essential to collecting data, conducting outreach, and planning and funding vital transportation services, but it is still slow and cumbersome in most situations. Concentrated local efforts to improve methods of collaboration might be worthwhile for the area's low-income transportation service providers and would lead to better analysis of results.
- More specific performance indicators should be dictated in the funding agreement and projects should devise their own desired reporting requirements to track performance consistently in addition to provide comparable statistics, such as those required by Job Access and Reverse Commute (JARC) program funding.
- Methods for timely modification of projects in the event that they do not meet expectations should be addressed in the funding agreement.
- More frequent check-ins with project sponsors may prove helpful, and meetings with all the LIFT sponsors could help facilitate collaboration and information sharing among the staff working on these issues.

LIFT Cycle III

In 2004, MTC issued a call for projects for the third and final cycle of LIFT funding. A total of \$2.6 million was available in JARC and STA funds. Twelve projects were funded. Of these, five projects were continued that were originally funded through the first LIFT Cycle and were unable to otherwise be sustained. None of the Cycle II projects were continued under Cycle III funding.

II. EVALUATION METHODOLOGY

This report is the product of MTC's evaluation of the 12 projects in the third cycle of the LIFT program. The evaluation process began with a review of the previous two LIFT funding cycles and a look at the exiting literature on outcome based performance measures for transportation projects serving low-income populations. It was followed by a review of each project's proposal to satisfy unmet community transportation needs as stated in their LIFT applications and agreed upon in their funding contracts. Project sponsors were then contacted to collect performance measurement data for each project. This data was usually relayed through quarterly reports sent to MTC. Quarterly reports and supporting documents were examined for key activities and service trends. An example of a quarterly report distributed by the MTC is located in Appendix D. Notably; each project type had a variation of this quarterly report with different forms of measurement.

An online survey was developed and distributed to each of the 13 agencies involved in the 12 projects in cycle III. The survey is reproduced in Appendix F, along with a brief summary of agency responses. Project sponsors were asked about timeliness of project implementation, funding, outreach and partnerships. All 13 agencies partook in the survey.

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Following completion of the survey, project sponsors were sent a list of discussion questions in preparation for a 40-60 minute interview with the LIFT project intern. All but two agencies were able to attend their interviews and provided thorough responses to questions about perceived obstacles, as well as successes and best practices recognized during project implementation. The interviews with the sponsoring agencies and, in some instances their collaborating partners, served to remind project sponsors of their original goals in terms of the sustainability of the project following expiration of LIFT funds. A copy of these discussion questions is located in Appendix G.

In many instances, the data summarized from the quarterly reports were found to have substantial gaps. In other cases, project managers had left their positions in the middle of or directly following the completion of their LIFT project, making data collection and reflection upon results difficult if not impossible. The online agency survey and agency interviews were quite helpful in filling information gaps. When they were not sufficient, sponsoring agencies were asked for more traditional performance measures related to their LIFT service or project.

III. LIFT III PROGRAM OVERVIEW

MTC issued a Call for Projects in August 2004 for the third and final LIFT cycle. MTC's screening conditions required that potential projects demonstrate the reduction or elimination of transportation as a barrier for low income persons seeking employment. Additionally, projects were to be nominated by a county welfare to work transportation or social service advisory committee, and be consistent with the particular county's welfare to work transportation plan. A total of 22 application were submitted which all together requested \$5.7 Million in LIFT funding. 12 projects were accepted. Two significant adjustments were made to LIFT cycle 3:

Match Requirement. Project sponsors were to provide at least a 30% match as part of their application. Cycle I had required a 50% match and Cycle II had required a 20% match.

Maximum Grant Amount. The maximum grant amount available for LIFT funding over the three year funding period was \$400,000. Cycle I had a maximum grant of \$750,000 for one project which had a three year duration and Cycle II had a maximum grant of \$2,000,000 for one project which had a two year duration.

Projects considered for LIFT funding eligibility included:

- New and expanded transit services
- Childcare transportation
- Rideshare activities
- Regional transportation projects such as a guaranteed ride home program
- Transit fare subsidy programs

MTC staff based project application evaluations on the following criteria:

- Cost effectiveness of the project to meet the unmet transportation need.
- Performance Indicators identified by clearly defined goals and objectives for the program.
- Project readiness for implementation.
- Match.

- Maximizing existing resources.
- Sustainability beyond grant period.
- Other factors such as concentration of CalWORKS clients and other low-income persons in the project area, and potential usability by the general population.

Programs that were cost-effective in improving the capacity of low-income workers to achieve and maintain employment, and had the ability to be sustainable after LIFT funds concluded were specifically targeted for funding. The complete Call for Projects and related application requirements and evaluation criteria are included in Appendix C.

Funding Allocations and Matches

Project funding was not allocated solely on the basis of low-income population, yet grant distribution by county closely matched low-income populations particularly in Alameda and Contra Costa counties. Figure 1 displays the breakdown of Funding by County. Since poverty level is closely linked to increased transportation barriers Figure 2 displays Families below the poverty level by county. While a majority of programs chosen were Flexible Route/ Demand Response the array of programs included three fixed route schedule extensions, two youth demand-response services, one taxi voucher, three auto programs, and three flexible route shuttles. Figure 3 displays funding by program type. Detailed descriptions of program types are on page 13. Project sponsors involved transit agencies, social service providers, non-profits, and other local government agencies. Collaboration between sponsors was necessary in order to obtain the necessary funding for each project. Figure 4 displays funding by sponsor type.

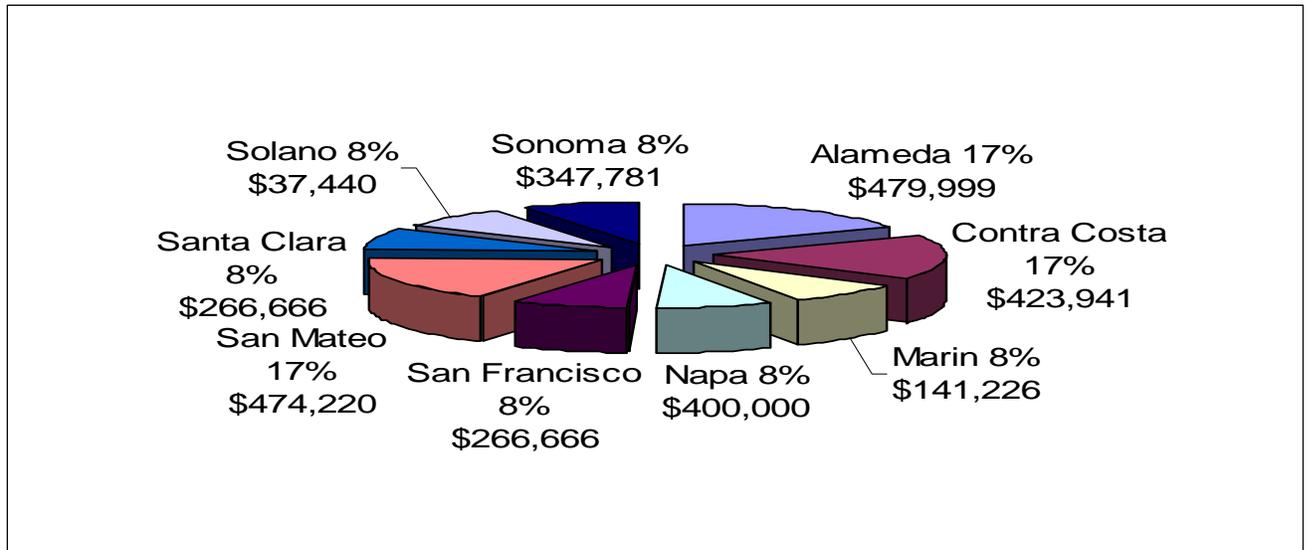


Figure 1. LIFT III funding by county.

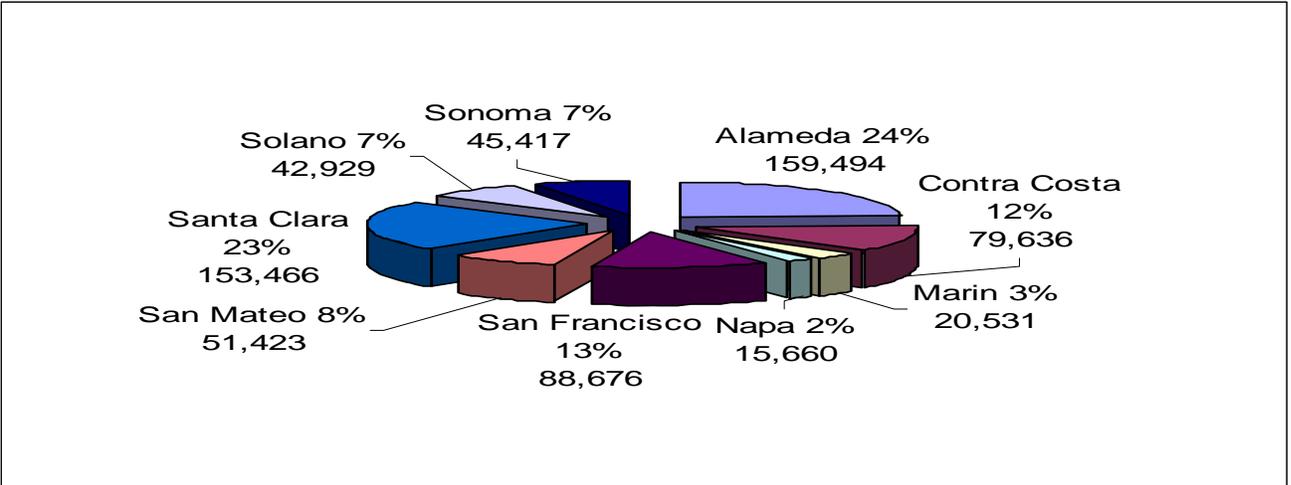


Figure 2. Bay Area Families below poverty level by county.

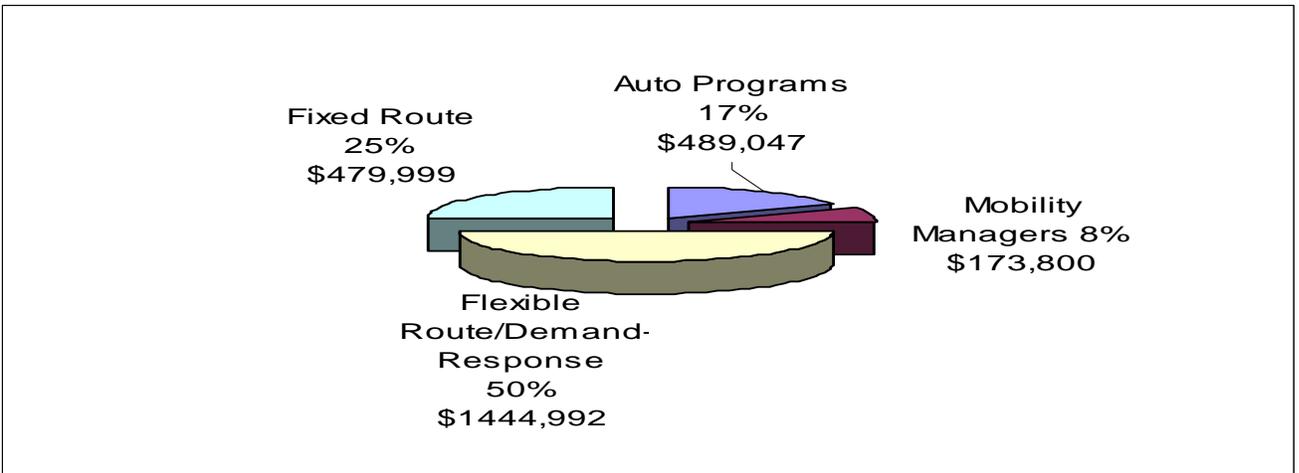


Figure 3. LIFT III funding by project type.

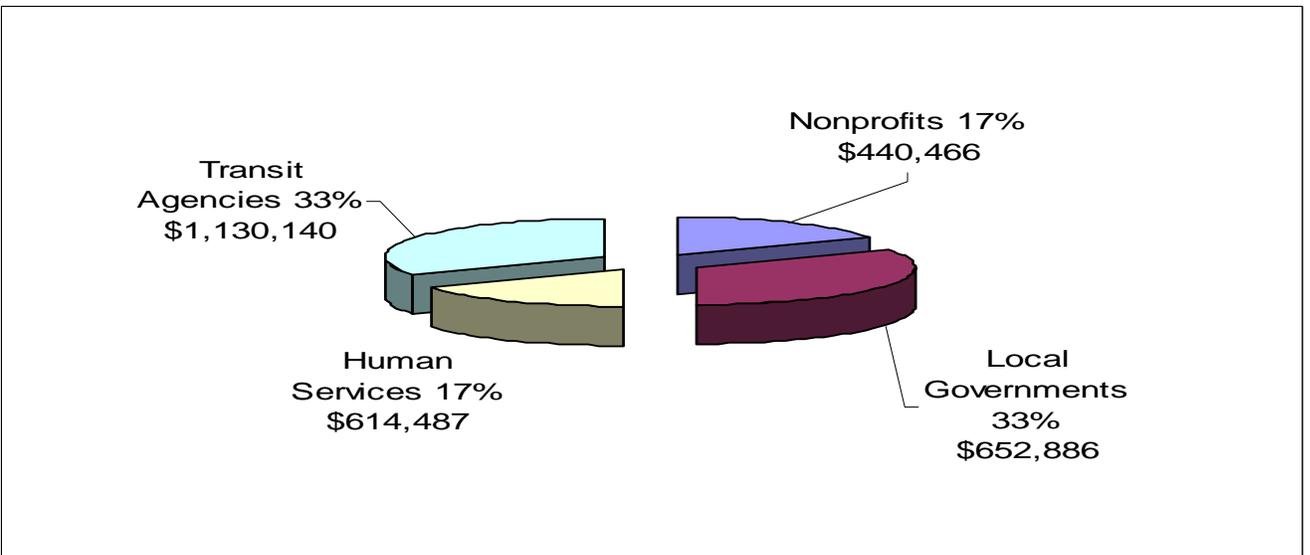


Figure 4. LIFT III funding by project sponsor type.

Funding Agreements and Reporting Requirements

Funding agreements between the MTC and sponsoring agencies stated the scope, intended function, and budget of each project including match responsibilities. Quarterly progress reporting requirements were also established. Performance measurement included:

- Service milestones including number of trips made and number of households served.
- A demonstration of improved access to jobs and support services such as childcare, shopping, and medical facilities.
- Service effectiveness and efficiency including cost to riders and daily trips made.
- Additional project components such as marketing and outreach techniques and coordination between stakeholders and previously existing transportation options.

Funding agreements were largely based on federal JARC reporting requirements, which address policy used to improve job access and reverse commutes. Funding agreements were modified to reflect each project. The quarterly progress reporting requirement is included in Appendix D.

IV. OVERVIEW OF LIFT PROJECTS AND PROJECT TYPES

This section provides a brief overview of the types of projects funded in Cycle 3 of the LIFT program. The projects are summarized in Table 1. Detailed project profiles are included as Appendix A. Figure 5 shows the locations of LIFT III Projects in the Bay Area.

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Table 1. Summary of the LIFT cycle III projects.

| Project Title | Sponsor | Project Type | Lift Funding Source | Local Match | Duration | Status after Lift |
|---|--|------------------------------------|---------------------------------|---|-------------|-------------------|
| 1. AC Transit Route 63 Alameda | AC Transit | Fixed Route | \$213,333 STA | \$53,332 24.9% | 12/04-12/06 | Continued |
| 2. MUNI 108 Line Treasure Island | San Francisco Municipal Railway | Fixed Route | \$266,666 STA | \$445,023 167.9% | 12/04-12/06 | Continued |
| 3. Contra Costa College Shuttle | WestCAT | Fixed Route | \$160,000 JARC \$90,141 STA | \$169,793 67.9% | 4/05-7/08 | Continued |
| 4. San Leandro LINKS Shuttle | San Leandro LINKS/ Davis Street Family | Flexible Route and Demand Response | \$266,666 JARC/STA | \$498,000 186.8% | 2/05-2/07 | Continued |
| 5. Napa VINE | Napa County Transportation Planning Agency | Flexible Route and Demand Response | \$400,000 JARC | \$490,000 122.5% | 05/05-06/08 | Continued |
| 6. East Palo Alto CalTrain Shuttle | City of East Palo Alto | Flexible Route and Demand Response | \$258,000 STA | \$258,800 100% | 05/05-05/09 | Continued |
| 7. East Palo Alto Youth Jobs Shuttle | City of East Palo Alto | Flexible Route and Demand Response | \$216,220 | \$216,200 100% | 05/05-05/09 | Continued |
| 8. Santa Clara County Give Kids a Lift | OUTREACH | Flexible Route and Demand Response | \$266,666 STA | \$304,500 114.2% | 07/05-06/08 | Continued |
| 9. Dixon Taxi Voucher | City of Dixon | Demand Response | \$31,200 JARC 6,240 STA | \$24,960 66.7% | 4/05-06/10 | Funds Extended |
| 10. Sonoma County Human Services/ Jewish Family & Children's Services | Sonoma County | Auto Program | \$266,666 JARC \$81,155 JARC | \$313,582 117.6% \$82,107 101.2% | 10/07-09 | Continued in part |
| 11. Marin Automotive Preventive Maintenance and Repair Project | Marin County | Auto Program | \$141,226 JARC | \$141,226 100% | 06/05-07 | Funds Extended |
| 12. Neighborhood House of North Richmond | Neighborhood House of North Richmond | Mobility Manager | \$124,900 JARC \$48,900 STA | \$74,250 42.9% | 05/05-05/08 | Continued |

Operating Projects

Fixed Route Transit Services

Cycle 3 of the LIFT program included expanding and continuing current Fixed Route services. Cumulatively \$730,140 of LIFT funding was allocated for these types of projects. Projects were matched at an average of 86.9% ranging from 24.9% to 167.9%. Projects aimed at maintaining current operations in low-income communities, while also extending hours of operation or increasing frequency of headways. All of the programs resulted in increasing the accessibility of fixed route services to low-income persons. All of the programs link to previously existing transportation options such as current AC transit routes or BART routes.

Average ridership ranged from 115 to 2,454 individuals per weekday. Average ridership for weekends was not available. Average cost per rider could not be calculated for certain projects, yet had increased 35.6% for one project, signifying that the cost per rider had increased throughout the duration of the program. Although most projects surveyed reported an increased efficiency in the ability for low-income residents to access jobs and other important services, there was no clear data reported from key agencies regarding how critical this increased efficiency was for the low-income population. All projects have continued after the end of LIFT funding.

Flexible Route/ Demand Response

Half of the LIFT projects funded provided Flexible Route and/or Demand Response services. Cumulatively \$1,444,992 of LIFT funding was allocated for these types of projects, a total of 51% of total cycle III funding. Projects were matched at an average of 115% ranging from 66.7% to 186.8% with an average match of \$248,743. Projects were sponsored by transit agencies, human service agencies, local government agencies and one non-profit.

Projects included two youth services and one taxi voucher system. Similar to fixed route services, flexible route projects also linked to previously available transportation options although at a lesser degree. Flexibility for rider needs included the ability to make shuttle reservations, hiring transportation managers to revise and reroute current schedules to meet demand, and providing taxi and shuttle services in areas where extending or adding new transit routes would not be cost-effective. Although demand-response services such as taxi and shuttle services appear less cost-effective than fixed route projects they respond to groups of people that live in sparsely populated areas or who have unique travel patterns.

Projects that had transportation managers were more likely to experience greater coordination between relevant agencies and had greater public outreach. Similarly, projects with larger public outreach experienced increased ridership. Most projects surveyed experienced additional riders per day, yet data was unclear on how much ridership had increased. One youth program experienced a decline in ridership during the duration of the project. The taxi voucher project projected a great need, yet experienced breaks in service due to low demand as a result of coordination barriers among agencies. This information suggests that the coordination between key agencies is integral to the success of these types of projects. Due to the fact that half of the

projects funded were flexible route and demand response services further insight into project coordination would be beneficial.

Capital Projects

Mobility Manager/ Bus Benches Program

One of the projects funded was mobility manager. LIFT funding was \$172,900 with a 42.9% match. Sponsored by a local nonprofit it aimed to educate individuals on the transit system involving language translation, training videos, and group outings. Outreach services aimed at assisting low-income people enter or re-enter the workforce. Although the project did not meet projections for expected clientele possibly due to cost per user, outreach services were highly successful in the community. Overall, project sponsors felt that they had experienced a high level of success with this project.

Auto Programs

Two of the programs funded were auto programs. Cumulatively LIFT funding totaled \$489,047 with an average match of 106.3% or an average of \$178,971 per project. One was funded by a county social service department the other was initially funded by a county social service department yet changed management to a nonprofit partway through. These programs occurred in more suburban and rural areas where the transit system is less extensive than in urban areas. The programs included vehicle maintenance, buying, and repair training workshops as well as training on obtaining a driver's license, vehicle insurance, and auto loans.

The program which reported greater community outreach experienced more attendees to workshops, where 80% of unemployed individuals were eventually employed with the help of the program. Due to varying operational and funding partners the other program was not as successful in coordinating public outreach. The program was revised to only include automobile grants. Vehicles are often necessary in more rural areas where other transportation forms of public transit are less extensive.

Project types can be further broken down to include the following categories identified by JARC to be essential for primary service goals. All of the LIFT projects fall into one or more of these groups.

1. **Trip-based services**: These services provide transportation directly to individuals. These include fixed routes, flexible routes, shuttles, demand-response services, and user-side subsidy programs such as vouchers, ridesharing, and guaranteed ride home.
2. **Information-based services**: These services provide information about transportation services to individuals but do not provide direct transportation services. These include mobility managers/brokerages, trip or itinerary planning, internet-based travel information, information materials and one-on-one training.
3. **Capital investment programs**: These are facilities and infrastructure which support transportation services. They include vehicle-based programs such as organizations making automobiles available to individuals or organizations, facility and amenity improvements and technology to support transportation services.

V. EVALUATION RESULTS

Program Administration

Project sponsors were surveyed on any challenges and barriers they experienced during the LIFT operation. Through the LIFT evaluation survey, a number of LIFT project sponsors indicated that they experienced some barriers in project implementation. Projects often began later than anticipated. From the project sponsors surveyed almost all were in the process of searching for a sustainable source of funding in order to continue their services. Funding was the largest barrier for almost all projects. Some projects remarked on restrictions placed by the MTC on what areas funding could be utilized.

While some projects also stated a difficulty in marketing their projects, the Richmond project in particular expressed a great success in their outreach efforts. Most project sponsors suggested that the performance indicators in the quarterly report were not the best way to measure the success of their programs. Complete Summary of responses for the online agency survey and discussion questions are located in Appendixes F and G.

Realizations of Project Expectations

Table 2 displays actual project outcomes as compared to original goals established during the application process. The Degree of Reconciliation refers to how closely program sponsors felt that their projects had met or exceeded intended goals and are measured using Low, Medium, and High. There are two sections for the Sonoma Auto Project. One section is for the project under the Sonoma County Human Services Department management and one for the project under the Jewish Family & Children's Services management.

Table 2. Realization of Expectations by Project Type.

| | | Expectations | Realizations | Degree of Reconciliation |
|--------------------|------------|---|--|--------------------------|
| Fixed Route | AC Transit | <ol style="list-style-type: none"> 1. Cost per rider: \$1.15 2. Continue operating 5:30 a.m. - 12:34 a.m. weekdays, 6:00 a.m. - 12:18 a.m. weekends. | <ol style="list-style-type: none"> 1. Cost per rider: unreported 2. Continued operating 5:30 a.m. - 12:34 a.m. weekdays, 6:00 a.m. - 12:18 a.m. weekends. <ul style="list-style-type: none"> ➤ 160 riders/weekday ➤ 116 riders/Saturday ➤ 95 riders/Sunday | Medium |
| | Muni | <ol style="list-style-type: none"> 1. 10-15 minute weekday headways 2. 20-minute weekend headways 3. 40-minute owl headways | <ol style="list-style-type: none"> 1. 15-20 minute weekday headways 2. 20-45 minute weekend headways 3. 45-minute owl headways <ul style="list-style-type: none"> ➤ 2,115 riders/weekday ➤ 1,382 riders/Saturday ➤ 849 riders/Sunday | Medium |
| | WestCAT | <ol style="list-style-type: none"> 1. 18/20 bi-directional stops within ¼ mile of low-income residence 2. 60-minute headways 3. Operate 8:00 a.m. – 5:00 p.m. every weekday 4. Cost per rider: \$3.00 5. 90-108 riders/weekday | <ol style="list-style-type: none"> 1. 16/20 bi-directional stops within ¼ mile of low-income residence 2. 60-minute headways 3. Operates 8:00 a.m. – 11:00 p.m. every weekday 4. Cost per rider: \$8.42 5. 115 riders/weekday | High |

(continues next page)

Table 2. Realization of Expectations by Project Type. (continued)

| | | Expectations | Realizations | Degree of Reconciliation |
|------------------------------------|----------------------|--|---|--------------------------|
| Flexible Route/ Demand Response | LINKS | <ol style="list-style-type: none"> 3,876 additional people serviced 9,445 additional trips to Davis Street 58% of additional riders represent working men and women making below \$35,000 10 hrs. service/weekday | <ol style="list-style-type: none"> Additional people serviced: unreported Additional trips to Davis Street: unreported Additional riders representing working men and women making below \$35,000: unreported 10 hrs. service/weekday <ul style="list-style-type: none"> ➤ 751 riders/weekday ➤ Cost per rider: \$1.87 | Medium |
| | NCTPA | <ol style="list-style-type: none"> Hire part-time Transportation Coordinator Add weekend service and extend operating hours of flexibly-routed shuttle Subsidize taxi service for very early or late trips Cost of taxi or shuttle trip (to the passenger): \$2.00 | Unknown | Unknown |
| | EPA Caltrain Shuttle | <ol style="list-style-type: none"> Increase ridership by 50% during last year of LIFT funding (from initial 95 riders/weekday) Cost per trip: \$4.50 | <ol style="list-style-type: none"> 118 riders/day (2005-2007) 66 riders/day (October 2007 – March 2008) Cost per trip: \$7.30 <ul style="list-style-type: none"> ➤ 55 employers, 1,800 jobs, and 1,180 entry-level jobs reached ➤ ~6 stops within ¼ mile of child care facilities, training and other employment support services ➤ ~6 stops within ¼ mile of residences of welfare recipients or low-income persons. ➤ 30-minute headways/weekday ➤ 60-minute headways/weekend | Medium |
| | EPA Youth Shuttle | <ol style="list-style-type: none"> 30-60 youth riders/day by third year of service Cost per rider: \$9.00 - \$14.00 | <ol style="list-style-type: none"> 17 riders/day (October 2007 and March 2008) Cost per rider: \$24.00 | Low |
| | Outreach | <ol style="list-style-type: none"> Establish Transportation Resource Coordinators CalWORKs and low-income families served: 40-60 Children enrolled, each receiving up to five rides per week or twenty rides per month during school months: 120-150 | <ol style="list-style-type: none"> Established Transportation Resource Coordinators CalWORKs and low-income families served: unreported Children enrolled, each receiving up to five rides per week or twenty rides per month during school months: 161 <ul style="list-style-type: none"> ➤ New schools and after-school sites reached: 23 (July 2005-March 2006) ➤ New residences served: 19 (July 2005-March 2006) ➤ Cost per trip: \$12.25 (July 2005-March 2006) | High |
| | Dixon Taxi Voucher | <ol style="list-style-type: none"> Clients per week: 20 Average subsidy per trip: \$20.00 | <ol style="list-style-type: none"> Clients per week: ~1 Average subsidy per trip: \$20.00 <ul style="list-style-type: none"> ➤ Total trips: 37 ➤ Number of transit-dependent residents of Dixon aided (est. 3,058): 8 | Low |

Table 2. Realization of Expectations by Project Type. (continued)

| | | Expectations | Realizations | Degree of Reconciliation |
|-------------------------|------|---|---|--------------------------|
| Mobility Manager | NHNR | <ol style="list-style-type: none"> 1. Install 20 bus benches 2. Insert art produced by neighborhood youth into bus benches, offer stipend to artists 3. Increase transit ridership by 3% in the target area by end of third year 4. Provide phone and walk-in support relaying transportation information 5. Implement “bus buddies” program 6. Provide transit training videos 7. Provide grocery shopping assistance, including transit planning to shopping | <ol style="list-style-type: none"> 1. Benches installed: 7 2. Art completed by neighborhood youth who received stipends, not yet installed 3. Transit ridership increases around bus benches: unreported 4. Phone and walk-in transit planning assistance offered at three locations <ul style="list-style-type: none"> ➤ Phone clients: 1,877 ➤ Drop-in clients: 1,720 ➤ Clients receiving transportation training: 2,165 5. Clients aided with “bus buddies” program: 32 6. Training videos distributed: 2,000 7. Clients receiving grocery assistance: 29 | Medium |

| | | Expectations | Realizations | Degree of Reconciliation |
|----------------------|-------------|--|--|--------------------------|
| Auto Programs | Sonoma HSD | <ol style="list-style-type: none"> 1. Provide free monthly transportation workshops 2. Offer diagnostic and repair services to 160 clients, spending up to \$400 on each client 3. Offer small grants to augment the Family Loan Program to 30 clients, at a maximum of \$1,200 per client | <ol style="list-style-type: none"> 1. Workshops or consultations offered: 47 2. Clients receiving diagnostic and repair services: 29 (average per client: \$429.35) 3. Clients receiving car grants: 26 (average per client: \$663.54) | Low |
| | Sonoma JFCS | <ol style="list-style-type: none"> 1. Continue providing free Transportation Education Workshops and coaching 2. Provide free automobile diagnostics for individuals who obtained approval for loans for car purchase 3. Continue providing transportation grants to approximately 50 individuals over the term of the LIFT grant, at a maximum grant of \$3,000 per individual | <ol style="list-style-type: none"> 1. Workshops or consultations offered: 14 2. Clients receiving repair services: 2 (average per client: \$923.90) 3. Clients receiving car purchase and payment grants: 5 (average per client: \$960.00) | Medium |
| | Marin | <ol style="list-style-type: none"> 1. Hold 36 auto care workshops 2. Have 432 CalWORKs participants attend auto care workshops 3. Provide auto repair and auto-related financial assistance to eligible clients | <ol style="list-style-type: none"> 1. Workshops held: 30 2. CalWORKs participants attending Auto Basics Workshop: 119 3. Participants assisted with auto repairs: 110 (average cost of repairs: \$1,100 per client) Participants assisted with insurance: 34 Participants assisted with smog checks/car registration: 37 <ul style="list-style-type: none"> ➤ Cost per Auto Basics Workshop attendee: \$64.29 | Medium |

Project Evaluation Criteria

This section of the evaluation examines actual project outcomes in terms of MTC’s criteria for project selection. It reports on: ridership or utilization of the services, cost effectiveness, job access improvement, planning, outreach and evaluation, and sustainability.

Ridership or Utilization

Table 3 shows a summary of utilization of LIFT III projects by type. As is evident by the variety of utilization measures, service efficiency cannot be clearly compared due to the varying nature of projects under the LIFT program. While some services provide countable rides and can easily determine an increase or decrease in ridership, other services such as Auto Programs are less clear as they target individual clients. There is no clear data regarding the success of many of these programs. There is also an inability to compare programs which have different measures of efficiency. The varying nature of the projects resulted in a barrier in measuring the success of the program overall. Each program was responsible for quarterly reporting to the MTC which measured:

- Service milestones such as usage.
- Outreach activities and project effectiveness.
- Coordination and promotion.

Notably, each project had a different manner of measuring performance. While some programs calculated cost to riders, others measured total usage. Some programs evaluated usage by hour or day, while others used month, or even quarter. Similarly, each project fulfills a different demand and serves a different population. Therefore, projects can not be directly compared.

Table 3. LIFT service utilization summary by project type.

| | | <u>Total Usage</u> | <u>Efficiency Grant Average</u> | <u>Largest Participation</u> |
|--|----------------------|------------------------|---------------------------------|------------------------------|
| Fixed Route | AC Transit | Unknown | 160 rides/hr. | 227 rides/hr. |
| | Muni | Unknown | 2,116 riders/day | Unknown |
| | WestCAT | 41,137 riders | 115 riders/day | 13,262 riders/quarter |
| Flexible Route/ Demand Response | LINKS | 383,199 riders | 715 riders/day | 940 riders/day |
| | NCTPA | 635,609 trips | 52,992 trips/month | 66,094 riders/day |
| | EPA Caltrain Shuttle | 11,781 riders | 66 riders/day | 1,854 riders/month |
| | EPA Youth Shuttle | more than 2,000 riders | 17 riders/day | Unknown |
| | OUTREACH | 161 clients | 47 clients/month | 65 clients/month |
| | Dixon Taxi Voucher | 37 clients | ~1 client per/week | Unknown |
| Mobility Manager | NHNR | 5,823 participants | 574 participants/quarter | 1260 participants/quarter |
| Auto Programs | Sonoma HSD | 178 participants | Unknown | 53 participants |
| | Sonoma JFCS | 43 participants | Unknown | 36 participants |
| | Marin | 321 workshop attendees | 16 participants/workshop | 31 participants/workshop |

Cost Effectiveness

Since each program fulfills a different demand for service, comparing total usage for each program can not be seen as the main indicator of performance. Notably, the auto programs and some demand-response programs have a smaller number of users. Yet, these programs may exist in more rural areas with smaller populations and fewer transportation options. Programs which are more client based can be fulfilling a need which may not be fulfilled elsewhere. Conversely, the fixed route and other demand-response programs were more cost-effective due to their larger clientele and lower cost per user. Yet, these programs tend to expand and supplement other transportation options which are available.

Collectively, fixed route programs had the largest numbers of users and had a lower cost per person than the other program types. The San Leandro LINKS shuttle, Napa VINE, and both East Palo Alto Programs also carried great numbers of riders and were less expensive for riders than other flexible-route projects. Still, many other flexible-route projects like WestCAT could not reach their expected cost per passenger resulting in a lower cost-effectiveness than projected. Similarly, the East Palo Alto CalTrain shuttle experienced an increased cost for passengers than projected. Overall, these programs did experience large numbers of riders, yet also resulted in an increased cost for passengers as compared to the fixed-route programs. For example, where as the average cost per rider for the AC Transit Route 63 project was \$1.15 per trip, the average cost per rider for the Santa Clara County OUTREACH project was \$12.25. Higher costs for programs other than fixed-route projects may have been due to a higher cost of implementing a pilot project and associated outreach efforts.

Job Access Improvement

Each of the projects implemented as part of the LIFT program made a contribution to improving employment access for low-income residents of the Bay Area. Most projects utilized surveys which aimed to assess employment improvement for users. One of the Youth transport services aimed to support parents seeking employment; while the other helped the youth participate in job training activities. Generally, most participants in the LIFT program believed that the services they received enhanced their mobility. In particular, fixed-route service extensions such as AC Transit Route 63 provided late night workers reliable transportation which did not previously exist. 80% of participants of the Marin auto program who were not initially employed gained employment during the program year. The projects that were most successful in helping users gain and maintain employment were those programs that also assisted in linking residents to support facilities and social service providers.

Planning, Outreach, and Evaluation

Appropriate planning, outreach, and coordination were essential for project success. Programs which were unsuccessful in marketing and community outreach were also unsuccessful in attaining the proposed amount of participants. Projects conducted planning and outreach in a variety of ways including educational workshops and presentations. These events occurred in key locations such as neighborhood council meetings, senior centers, schools, and faith-based locations. Presentation materials were often translated into different languages. Print information included distributing flyers and posting them on community bulletin boards, newspapers, and websites. The Napa VINE project was successful in obtaining a segment on a local news station.

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The Sonoma County auto program engaged in innovative marketing including a free oil change with workshop participation in order to gain more participants. Overall, pilot shuttle and auto programs engaged in more public outreach than did flexible-route projects.

Some of the demand-response shuttle programs, the Dixon Taxi voucher program, and both auto programs were able to keep records of participants. This enabled these programs to follow employment records and conduct surveys with service users. Still, the participants in some of these programs were too small to ascertain definitive trends.

Coordination between appropriate agencies was also a key determinant of program success. Most programs surveyed felt that they had experienced a high level of coordination between pertinent agencies. Some programs such as the WestCAT shuttle felt as though relevant parties did not fully engage in coordination and promotion of the project. In particular both East Palo Alto Programs held monthly meetings for agency members to attend. Programs with mobility managers or transportation coordinators experienced higher levels of coordination.

Sustainability

Sustainability is also a main component of program success. All of the projects were able to continue after the termination of LIFT funding. Funds were extended for two projects, while one project only continued partially. The likelihood of sustainability was closely linked to meeting project expectations. Quarterly evaluations enabled programs to make modifications which would facilitate program sustainability after the termination of MTC funds. In particular some projects such as San Leandro LINKS found that they needed to continue and expand outreach efforts in order to gain more users. The Sonoma County auto program changed supervision and began to focus on auto maintenance moving away from repair loans. Most projects stated that they would continue to seek alternative funding sources.

Project Performance Analysis

Table 4 displays an assessment of the twelve projects under LIFT cycle III using the performance measurement matrix the Federal Transit Administration uses for the JARC program. Projects received a rating of low (L), medium (M), or high (H). The rating is based on the project degree of reconciliation and overall program success. Notably, the Sonoma Auto program received a rating of low/medium. The low score refers to the program under the Sonoma Human Services Department management, while the medium score refers to the program under Jewish Family & Children's Services management.

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Table 4. LIFT III results categorized by FTA’s JARC performance measurement matrix.

| Service or Project | (A) Expanded Geographic Coverage | (B) Extended Hours/ Days of Service | (C) Improved System Capacity | (D) Improved Access / Connections | (E) Improved Customer Knowledge |
|---|--|--|------------------------------|--|--|
| I. Trip-Based Services | | | | | |
| 1. Fixed Route | ➤ WestCAT H | ➤ AC Transit M ➤ MUNI M | ➤ MUNI M | | |
| 2. Flexible Routing | ➤ San Leandro LINKS M ➤ Napa Shuttle N/A ➤ EPA Caltrain M | ➤ San Leandro LINKS M ➤ Napa Shuttle N/A ➤ EPA Caltrain M | | ➤ San Leandro LINKS M ➤ Napa Shuttle N/A ➤ EPA Caltrain M | |
| 3. Shuttle Service | ➤ Napa Shuttle N/A ➤ EPA Caltrain M ➤ EPA Youth L | Napa Shuttle N/A ➤ EPA Caltrain M ➤ EPA Youth L | | ➤ Napa Shuttle N/A ➤ EPA Caltrain M ➤ EPA Youth L | |
| 4. Demand Response | ➤ Napa Shuttle N/A ➤ EPA Youth L ➤ Outreach H | ➤ Napa Shuttle N/A ➤ EPA Youth L ➤ Outreach H | | ➤ Napa Shuttle N/A ➤ EPA Youth L ➤ Outreach H | |
| 5. User-side subsidy | ➤ Napa Shuttle N/A ➤ Dixon L | ➤ Napa Shuttle N/A ➤ Dixon L | | ➤ N Richmond M ➤ Marin Auto ➤ Dixon L | |
| II. Information-Based Services | | | | | |
| 1. Mobility manager | | | | ➤ N Richmond M ➤ Marin Auto M ➤ Outreach H | |
| 2. One Stop Center / referral | | | | ➤ N Richmond M ➤ Outreach H | ➤ N Richmond M |
| 3. Trip / itinerary planning | | | | ➤ N Richmond M | ➤ N Richmond M |
| 4. One-on-one training | | | | ➤ N Richmond M ➤ Sonoma Auto L/M | ➤ N Richmond M ➤ Marin Auto M ➤ Sonoma Auto L/M |
| 5. Internet-based information | | | | | |
| 6. Information materials / marketing | | | | | ➤ Napa Shuttle N/A ➤ Outreach H |
| III. Capital Investment Projects | | | | | |
| 1. Vehicle for individual | ➤ Sonoma Auto L/M | ➤ Sonoma Auto L/M | | | |
| 2. Vehicle for agency | | | | | |
| 3. Vanpool | | | | | |
| 4. Carsharing | | | | | |
| 5. Other capital projects | | | ➤ N Richmond M | ➤ N Richmond M ➤ Marin Auto M ➤ Sonoma Auto L/M | |

The Dixon Taxi Program and the Sonoma Auto Program under Sonoma Human Services Department both received a low rating. While the Sonoma Auto Program had administrative strains they also suggested that the use of grant money was partially restrictive. Overall challenges for both programs included outreach and marketing efforts. The OUTREACH Give Kids a Lift program received a high rating. The program reported a high rate of coordination among participants, appropriate staff, and community partners. A high level of coordination and outreach efforts contributed to the program's overall success. The complete summary of Agency responses from the online survey is located as Appendix F.

VI. KEY FINDINGS AND RECOMMENDATIONS

Due to the varying nature of the LIFT projects it is difficult to find a method in which to evaluate the success of the program overall. The program includes diverse projects in different geographic locations which fulfill a large variety of needs. There is no clear mechanism to rate program success other than each project's ability to break down transportation barriers for low-income individuals. In order to do this some type of methodology must be utilized. Quarterly reporting requirements seem to be the most efficient manner in which to gather pertinent information and compare individual project output. Yet, cost-effectiveness, cost per user and other efficiency measurements utilized may be useful for some projects but not for others.

Clearly projects which had greater coordination between key stakeholders and agencies had greater community outreach extending utilization into low-income populations. Projects with greater coordination and outreach also found implementation to run at a smoother level than those that did not. In order to come to key conclusions and recommendations about the LIFT program overall individual projects were rated utilizing JARC performance measurements. Best practices and recommendations were developed from the projects which met the most JARC objectives. Findings from the table on pages 20 and 21 suggest that combining important elements of the most successful projects can be a useful tool in understanding and evaluating programs similar to LIFT. Utilizing this methodology enables projects to distinguish the most successful LIFT projects and emulate best practices. The recommendations developed directly reflect best practices of these LIFT projects.

Recommendations for assessing similar programs to the LIFT and Lifeline programs are listed below:

1. **Program sponsors should be encouraged to identify a local mobility manager or transportation coordinator in their project applications who can provide coordination support.** This person should be aware of the project and aid in any type of coordination among agencies. If the proposed project does not have funding in place to provide a transportation coordinator, MTC can assist in finding a relevant agency for the project sponsors to work in coordination with. Mobility Managers can derive from social services agencies or transit operators. They must understand all projects within the area as well as the current transportation system and services. They must work in conjunction with project managers to ensure that mobility needs are being met.

2. **Project sponsors should hold at least quarterly meetings between key stakeholders and partnering agencies.** The purpose of these meetings should be to discuss project execution and alter program goals and expectations if necessary, in order to reach the target population and meet established expectations.
3. **MTC should supply project sponsors with guidelines regarding best practices of similar project types.** This will equip sponsors with a framework to create a smooth implementation process.
4. **Project sponsors should include a reasonable methodology for projecting service demands in their applications.** These may include reference to key demographics, need for service, and expected outreach. The methodology should be clear in order to assess demand and plan accordingly.
5. **The qualitative aspect of projects need to be assessed in evaluating project success for programs similar to the LIFT program.** The value to users may be extremely high in some cases allowing people to have access to transportation, jobs, and other essential services where they otherwise would not be able to. Programs with a high value to users may not be as cost-effective as other projects that serve a large population but provide a much needed service. Projects should be based on qualitative benefits as well as quantitative. While the ultimate goal is always to provide service to as many participants as possible, programs that serve fewer people may also provide an extremely high benefit to users. More research needs to be developed in assessing access and how it has helped low income populations.
6. **MTC should conduct focus groups with sponsors of similar projects to discover and utilize best practices.** Project sponsors could be asked in their initial funding application if they would be willing to participate in these focus groups.

VII. CONCLUSIONS AND NEXT STEPS

Key findings suggest program sponsors for similar projects should collect data and conduct outreach and planning in a manner which is relevant for their individual project. Utilizing best practices of the most successful LIFT projects is the most comprehensible manner in which to do this. More specific performance measurements should be established during the application process, eliminating any uncertainty prior to implementation. Utilizing JARC performance measurements also provides a manner in which project sponsors can track performance. Similarly, all projects continued at some level after the termination of LIFT funding. The MTC played an instrumental role mainly through the Lifeline Program in supporting these projects. The importance of the continued projects shows a commitment on the local level to maintain these projects.

Next Steps: Lifeline Transportation Program

In 2005, through an update to the region's long-range transportation plan -Transportation 2030 - MTC committed \$216 million over the 25-year horizon of the plan to creating a regional Lifeline Transportation Program for residents of low-income communities throughout the Bay Area. The objectives of the program included:

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- Better identification of gaps in transit service, affordability and safety.
- Closer coordination with other agencies to improve the transportation options for low-income communities, and
- Securing adequate resources to respond to Lifeline mobility needs.

In April 2005, MTC adopted guidelines for the Lifeline Transportation Program (LTP). Like LIFT, the LTP seeks to improve the mobility options for the region's low-income population. While the LIFT program was administered by MTC at the regional level, MTC delegated oversight of the LTP to each county. In most cases, the Congestion Management Agency (CMA) that assumes the lead role in conducting community-based transportation plans is responsible for administering the Lifeline Program within that county. The rationale for this change was that CMAs are already overseeing the Community Based Transportation Planning program, which identifies and prioritizes transportation needs at the local level. Therefore, they would be more familiar with local communities' priorities than MTC. In addition, in some counties, CMAs may be able to facilitate a fund exchange for more flexible funding sources than those available to the Lifeline Program.

In July 2008, MTC adopted guidelines for the second cycle of the Lifeline Transportation Program (LTP). Like the first Lifeline Transportation cycle the program was administered by CMAs. Funding for this cycle was derived from Job Access and Reverse Commute (JARC), State Transit Assistance (STA), and Proposition 1B- State Transit Funds. Funding amounts from these three sources were determined by poverty populations within the plan area. All Projects were funded for three years and required a 20% match. Projects were assessed similar to LIFT projects using criteria such as demonstrated community need, project budget and sustainability, and relevant performance measurements.

Since MTC's initial commitment, the Lifeline Program received an influx of federal and state funding, bringing the program total to over \$280 million. In the current update to the long-range plan, the Commission more than doubled its commitment by adding \$400 million, raising the amount dedicated to the Lifeline Transportation Program to nearly \$700 million over the 25-year horizon of the plan.