

Lifeline Program Evaluation

Handout 1: Community-Based Transportation Plans (CBTPs)

Projects funded through the Lifeline Transportation Program emerge from CBTPs as solutions proposed to fill identified transportation “gaps”. The gaps, or needs, are identified through extensive public outreach. The intention of this process is that the resulting projects will be of high importance to the community and will represent a solution to a real unmet need.

Through the preparation of the Lifeline Transportation Network Report, a total of 41 communities of concern were identified for community-based planning. MTC also committed to conducting a CBTP in each of these communities in order to identify relevant transportation needs and solutions to addressing those transportation gaps. Figure 1 below summarizes the number of CBTPs per county and by Lifeline Program phase. While a total of 41 CBTPs will be conducted, as of November 2010 only 28 (68%) were complete and available for this program evaluation.

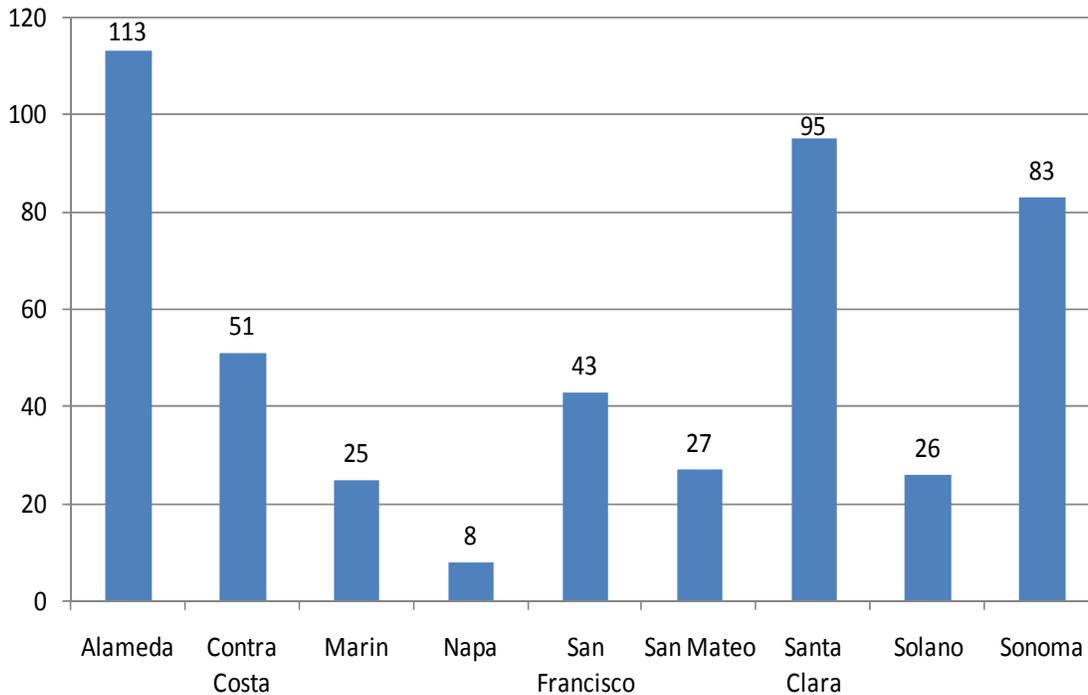
Figure 1 CBTPs by County

County	CMA	Phase 1	Phase 2	Total Planned CBTPs	Not completed
Alameda	ACCMA	4	1	5	0
Contra Costa	CCTA	4	2	6	2
Marin	TAM	2	0	2	0
Napa	NCTPA	1	0	1	0
San Francisco	SFCTA	3	4	7	3
San Mateo	CCAG	2	2	4	2
Santa Clara	VTA	3	4	7	4
Solano	STA	3	2	5	2
Sonoma	SCTA	1	3	4	0
Totals		23	18	41	13

Projects Emerging from CBTPs

A key step in this evaluation is determining the number and types of projects proposed in the completed CBTPs, and to indicate the extent to which these projects have been implemented. A total of 515 projects or strategies were proposed in the 28 completed CBTPs. Figure 2 below shows the number of projects proposed for each county.

Figure 2 Number of Strategies and Projects Proposed in CBTPs, by County



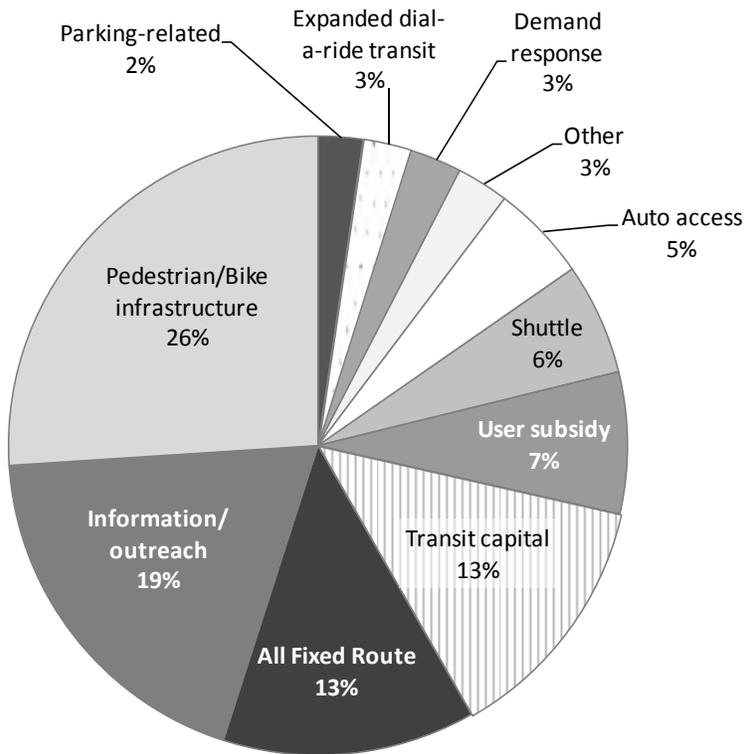
Projects proposed in CBTPs were also categorized to determine where the overall emphasis was placed by the plans by type of project.

Over one-quarter of projects were either pedestrian or bicycle infrastructure projects. The second largest category of projects was that of information and outreach. Additional categories included: transit capital, fixed-route service (new, expanded, or continued), user subsidies, shuttles, demand-response service, parking related projects, and expanded dial-a-ride service. Projects not falling into these categories were categorized as “Other”. Some examples of “other” projects include projects to:

- Address diesel truck emissions, traffic and parking (Alameda County/Oakland)
- Provide subsidized child care at Richmond BART (Contra Costa County/Richmond)
- Provide rides to school for parents (Marin County/San Rafael, Canal Neighborhood)

Figure 3 below shows the distribution of projects proposed in CBTPs by type.

Figure 3 All Proposed CBTP Projects by Type



In addition to the CBTPs, MTC also developed a Coordinated Public Transit Human Services Transportation Plan for the Bay Area in 2006-2007. This report consisted of two parts: the Elderly and Disabled component, and the Low-Income component. The Elderly and Disabled Component's recommended solutions combines those identified for senior and disabled populations with needs and strategies for low-income populations. Figure 3 also includes projects from the Coordinated Plan

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Handout 2: Project Evaluation Methodology

Criteria for Inclusion in MTC Lifeline Evaluation

In consultation with MTC, the team developed criteria for determining which funded projects would be evaluated. These criteria recognize that while a project may have been granted funding, it may not have been implemented yet, or may have been in operation for too short a time for any meaningful assessment.

All Cycle 1 projects (Tier 1 and 2) and all Cycle 2/Tier 1 projects were included in an initial pool for potential evaluation. The list of Cycle 2 projects to be evaluated was further refined to include:

- Any operating projects that are a continuation of an existing project from Cycle 1
- Projects of any kind that have received at least 50% of their Cycle 2 allocation
- New operating projects that have operating data for at least one year
- Programmatic and capital projects on a case-by-case basis

Filtering the list of 102 funded projects against these criteria yielded 71 projects that were suitable for evaluation. In collaboration with MTC, an online survey was developed, and the sponsors of the 71 projects were invited to participate in the survey. A total of 51 surveys (one per project) from 29 sponsors were received. The projects for which surveys were returned are evaluated in the report.

Figure 1 Projects Included in the Evaluation

Project Type	Number of Projects	Percent of Projects
Transit Operations	26	51%
Fixed Route - New	3	
Fixed Route - Expanded	2	
Fixed Route - Continuing	17	
Demand Response	4	
Shuttles	3	6%
Transit Capital	11	22%
Auto-based	3	6%
Information and Outreach	3	6%
Pedestrian & Bicycle	2	4%
User Subsidy	2	4%
Other	1	2%
Total	51	100%

Three Levels of Evaluation Criteria

Projects were evaluated on three levels. First, did they meet the goal of the Lifeline Program? The goal of the Lifeline Program is to support community-based transportation projects that:

- Are developed through a collaborative and inclusive planning process that includes broad partnerships among a variety of stakeholders.
- Address transportation gaps and/or barriers identified through a Community-Based Transportation Plan (CBTP) or are otherwise based on a documented assessment of needs within the designated communities of concern.
- Improve a range of transportation choices by adding a variety of new or expanded services.

Second, how well do they meet criteria established for specific project types? To support this component of the project evaluation, six types of projects were identified, and evaluation criteria specific to the project types were developed. The criteria are a combination of those used in the FTA's JARC/New Freedom Funds matrix (2007) modified through input from the Technical Advisory Committee. Projects were evaluated using these criteria where the required data was provided by the sponsor. The types of projects and the type-specific criteria are shown in Figure 2 on the following page.

Third, how well did each project meet the specific goals stated in the application for funding? In the online survey, project sponsors were asked to provide these goals, and to state how well the project met these goals. In the project-level evaluation, the extent to which projects have met their goals is based on the sponsor's response, rather than an objective assessment of individual projects.

Figure 2 Project Type-Specific Evaluation Criteria

Project Type	Examples	Type-specific criteria
Auto-based	Auto access (auto loans, repair programs)	<ul style="list-style-type: none"> • Number of participants • Loan default rates • Cost per beneficiary • Number of applications: number of loans granted
Transit operations	Demand-response, expanded dial-a-ride transit, shuttle Fixed route: New, continuing, expanded	<ul style="list-style-type: none"> • Ridership (Number of one-way trips) • Service hours (added, restored, maintained) • Cost per passenger • Duration of service (in context of service cuts) • Affordability
Pedestrian & Bicycle	Sidewalks Bike paths Access to transit	<ul style="list-style-type: none"> • Qualitative, based on interviews with residents
Information & outreach	Marketing programs	<ul style="list-style-type: none"> • Number of customer contacts • Number of languages • Units printed/distributed • Increase in usage after outreach (e.g. SFMTA has data on bus pass purchases) • Qualitative information from interviews
Transit capital	Bus and van purchase, bus stops improvements	<ul style="list-style-type: none"> • Confirmation from sponsor of number of units constructed/rehabilitated/purchased • If the purchase enabled continuation of a program, qualitative info from participants.
User subsidy	Bus passes, taxi scrip	<ul style="list-style-type: none"> • Number of participants • Number of vouchers/passes purchased • Qualitative information from interviews

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Lifeline Program Evaluation

Handout 3: Draft Recommendations by Program Area

Program Area	Recommendation
A. Program Design and Guidelines	1. Clarify relationship of project inclusion in a CBTP, or location in an MTC-defined Community of Concern, to project eligibility.
	2. Retain current emphasis on projects derived from documented needs or priorities emerging from CBTPs, but continue to consider other relevant local planning efforts as well.
	3. Reassess the trade-offs involved with requiring non-profits to have public sponsors for some fund sources.
	4. Promote—and create a process to support—applications for multi-county projects.
	5. In developing its position related to reauthorization of the federal transportation funding bill, MTC should consider advocating for a reduced match requirement for JARC operating projects.
	6. Continue to support a mix of transit and non-transit related projects.
	7. Clarify and strengthen the role of local program administrators.
B. Funding Sources	1. Seek to identify other, more flexible funds for use in the Lifeline Transportation Program.
C. Timelines	1. Establish a regular, predictable funding cycle and call for projects to solicit Lifeline projects.
	2. Ensure that a reasonable period of time is provided between the issuance of the county-level call for projects and the deadline for submission.
	3. Assess whether reporting timeframes can be better synchronized with reporting generated by project sponsors for other funders.
D. Oversight/ Monitoring/ Evaluation	1. Locate the primary responsibility for project monitoring and evaluation with the CMAs.
	2. Assess the feasibility of developing a regional web-based database for the Lifeline Program that would incorporate electronic applications, reporting by project sponsors, and report-generation.
	3. Require “continuation” projects to demonstrate or document their performance in a more systematic manner.
	4. Encourage CMAs to pay particular attention to project plans, timelines, and project management capacity when evaluating grant applications.
	5. Encourage sponsoring agencies to take steps to monitor the quality of service implementation, including meetings with advisory committees, neighborhood councils, major employers and bus drivers, as appropriate to the project.
E. Promotion of Program/ Dissemination of Calls for Projects	1. Ensure that potential applicants that are not traditionally involved with transit are included in the call for projects.
F. Project Selection	1. Address misunderstanding regarding the role of the CMAs in ranking and selecting projects.
	2. Encourage CMAs to include a diverse group of interested stakeholders in ranking project applications.
G. Collaboration and Outreach	1. Encourage applicants and sponsors to cast a wide net in search of potential collaborators, which might include social service agencies, transit and bicycle advocacy groups, and non-profit groups close to the target population.