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Memorandum

TO: Partnership Technical Advisory Committee

DATE: February 4, 2008

FR: Christina Atienza

RE: New Freedom FY 2005-06 Program of Projects for Large Urbanized Areas

This memo presents the recommended \$1.5 million program of projects for the FY 2005-06 Bay Area's New Freedom Program.

Background

SAFETEA established the New Freedom Program to address the transportation needs of disabled persons through the provision of new services and facility improvements that go beyond those required by the Americans with Disabilities Act. The Program provides grants for operating and capital costs. Funds are apportioned 60 percent to large urbanized areas (UAs), 20 percent to small urbanized areas, and 20 percent to non-urbanized areas; and then within each area type, through a formula that is based upon the population of persons with disabilities. The table below shows apportionment amounts for the Bay Area's large UAs, for which MTC is the designated recipient; and California's small and non-UAs, for which Caltrans is the designated recipient. Designated recipients are responsible for conducting a competitive selection process to determine which projects should receive funding.

	Actual FY 2006	Actual FY 2007	Estimated FY 2008	Estimated FY 2009
Bay Area Large UA	\$1,545,232	\$1,612,117	\$1,741,484	\$1,840,998
Antioch	\$56,232	\$60,601	\$65,464	\$69,205
Concord	\$127,429	\$121,779	\$131,551	\$139,069
San Francisco-Oakland	\$885,254	\$950,208	\$1,026,459	\$1,085,114
San Jose	\$404,370	\$399,440	\$431,494	\$456,151
Santa Rosa	\$71,947	\$80,089	\$86,516	\$91,460
California Small & Non-UA	\$2,369,770	\$2,339,499	\$2,527,237	\$2,671,650

UA = Urbanized Area

■ = Subject of Proposed Program of Projects

Note: The names given to the UAs correspond to the most populated city/cities within the area, but the areas themselves are larger.

Staff had originally intended to wait for the adoption of the Elderly and Disabled component of the Bay Area's Coordinated Public Transit-Human Services Transportation Plan (Coordinated Plan) prior to issuing a New Freedom call for projects, so that findings from the plan could be used to inform project development and programming priorities. However, by September 2007, it was estimated that the earliest that the Coordinated Plan could be adopted would be December 2007; so that delay in programming New Freedom might put the FY 2006 apportionment at risk of expiring and being lost to the region. Staff reviewed the timeline with the Elderly and Disabled Advisory Committee (EDAC) at their October 2007 meeting, and the Committee

concluded with the following proposal: advance programming of the first year/FY 2006 apportionment (roughly 20 percent of the total SAFETEA New Freedom Bay Area share) prior to the adoption of the Coordinated Plan; follow a simplified, abbreviated process to ensure that the FY 2006 funds will be obligated in a timely fashion; and use insights from the FY 2006 funding cycle to inform programming priorities for the remaining three years of funding. In short, this represented an “interim” step for developing the New Freedom programming process.

Competitive Selection Process

With EDAC’s consent, MTC released the call for projects on November 9, 2007, with applications due on December 14, 2007. Prospective applicants were informed that the apportionment amount for each large UA would serve as the target programming amount for projects within those UAs; and that projects that provide services in multiple UAs may compete for funding from all affected UAs. Eligible projects were limited to those that could be underway in FY 2009. Eligible applicants were limited to local government authorities and public transportation operators, and interested non-profit agencies and private operators of public transportation services were encouraged to partner as appropriate with a public agency sponsor. Drawing from both the Lifeline Transportation Program and the draft Coordinated Plan, qualitative evaluation criteria were developed, which included: demonstration of need and benefits; evidence of coordination, partnership, and outreach efforts; and project readiness. Also, applicants were required to consider in the development of their proposals the transportation gaps and coordination strategies that were identified in the draft Coordinated Plan.

Staff received 16 applications, totaling roughly \$2.7 million, or nearly 75 percent above the available funding. Of the 16 applications, eight were operational projects, three were traditional capital projects, and the remaining five projects involved mobility management, which FTA considers an eligible capital expense. Mobility management is a term used to describe service development and management that focuses on the needs of specific customer markets, in this case the transportation-disadvantaged disabled population, and involves establishing a variety of coordinated services that are tailored to more cost-effectively meet the needs of this market. Mobility management figures prominently in SAFETEA’s human service transportation coordination initiatives, and is identified as a need in the Bay Area’s own Coordinated Plan.

An evaluation panel consisting of EDAC Vice-Chair Craig Yates, EDAC member Marshall Loring, and two MTC staff convened on January 18, 2008 to determine which projects should be recommended for funding. Under each evaluation criterion, the following emerged as the key considerations for the panel’s recommended prioritization:

- Demonstration of Need and Benefits: ensuring the disabled population as the primary target audience; innovation and cost-effectiveness;
- Evidence of Coordination, Partnership, and Outreach Efforts: the extent to which New Freedom funding could serve as seed money for pursuing more complex mobility management initiatives
- Project Readiness: having a committed funding plan; thoroughness and reasonableness of the scope of work; for expansion projects, the demonstrated success of any pilot projects; and history of the sponsor’s successful management of related projects.

For determining the amount of funding, considerations included the total amount of available funding for each UA, eligibility for funding from multiple UAs, reasonableness of the cost estimate, and project scalability.

Recommended Program of Projects and Next Steps

Attachment A shows the list of applications and the evaluation panel's recommendation for New Freedom funding for each project. For projects with recommended funding that is less than the requested amount, staff has confirmed that the project sponsors would be able to implement a viable element of their initial project proposal. Staff have also briefed all applicants who are not proposed to receive funding at this time; and where appropriate, have provided suggestions for improvements to their applications that may enable them to compete better in the upcoming funding cycles, for example by providing additional information in areas where the evaluation panel may have desired clarification or justification, developing a more refined scope of work, etc. In addition to PTAC, the draft recommendations will be presented and discussed with EDAC and the Transit Finance Working Group; and finally with MTC's Programming and Allocations Committee (PAC) for their approval and referral to the Commission for adoption.

The next call for projects for the remaining three years, or approximately \$5.1 million, of authorized New Freedom Program funding is expected to be released in late Summer or early Fall of 2008. Based on lessons learned from this funding cycle, staff will work closely with EDAC, the Transit Finance Working Group, and other stakeholders to refine the New Freedom programming policies, including assessing the adequacy of the evaluation criteria and developing an appropriate framework for the growing interest in mobility management in the Bay Area (a key focus area of the Coordinated Plan). Since there will be more time to develop the program of projects without risk of losing funds, staff will present the proposed programming policies to the various committees for review prior to beginning the next call for projects.

Attachment A
Recommended Funding from New Freedom Program
FY 2005-06 Large Urbanized Area Apportionment

No.	Sponsor	Project Name	Total Cost	Amount Requested	Recommended Grant Amount
Projects Recommended for Funding (alphabetical by sponsor)					
1	AC Transit	Paratransit Inventory	180,000	144,000	144,000
2	Benicia, City of	Taxi Scrip Program Extension	30,000	15,000	15,000
3	Berkeley, City of	Ed Roberts Campus/Ashby BART Station Intermodal Accessibility Enhancements	1,106,568	885,254	669,405
4	CCCTA	Community Connection Program Expansion	125,000	62,500	62,500
5	CCCTA	Comprehensive Mobility Options Inventory	43,750	35,000	35,000
6	Contra Costa Co. Employment & Human Services Dept	Contra Costa Volunteer Driver Program Expansion	153,114	45,000	45,000
7	SamTrans	Peninsula Ride Connection	184,200	147,200	147,200
8	San Francisco MTA	NextMuni Audible Arrival Time/Push-to-Talk	523,000	418,400	200,000
9	VTA	Mobility Options Travel Training Program	454,254	227,127	227,127
Projects Not Recommended for Funding (alphabetical by sponsor)					
10	AC Transit	Mobile Data Terminals/Automatic Vehicle Locators for East Bay Paratransit Fleet	480,000	384,000	-
11	Alameda, City of	Audible and Countdown Signal Access Enhancement	169,364	135,000	-
12	Lafayette, City of	Lamorinda Spirit Van II for Medical and Dental Services	82,794	28,500	-
13	LAVTA	LAVTA Travel Training	159,594	29,000	-
14	Marin Transit	Marin Transit Mobility Management Office	144,813	115,850	-
15	Rio Vista, City of	Route 52 Service Expansion	11,000	5,500	-
16	San Francisco MTA	Paratransit Ramp Taxi Driver Incentive Program	110,000	55,000	-
				Total	\$ 2,732,331
				Total Available	\$ 1,545,232
				Balance	\$ -