



METROPOLITAN
TRANSPORTATION
COMMISSION

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Memorandum

TO: Elderly and Disabled Advisory Committee DATE: February 5, 2008
FR: Christina Atienza W. I. 1513
RE: New Freedom Proposed Program of Projects

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 by formula to large, small, and non-urbanized areas (UAs). MTC is responsible for conducting the competitive selection process to determine which projects should receive funds that are apportioned to the Bay Area’s large UAs, while Caltrans is responsible for conducting the same for funds that are apportioned to the small and non-UAs throughout the state. The following table shows the amount of available funding by area type and year of apportionment. This memo presents the recommended program of projects for Bay Area’s roughly \$1.5 million large UA apportionment in FY 2006.

	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
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

“Interim” New Freedom Program

The proposed FY 2006 program represents an “interim” step for developing the New Freedom programming process for the remaining roughly 80 percent of funds authorized under SAFETEA. 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; the delay in programming was enough to put the FY 2006 New Freedom funds at risk of expiring and being lost to the region. At EDAC’s October 2007 meeting, we reviewed this timeline with you and obtained your consent to: program the first year (FY 2006) funds 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 not lost to the region; and use insights from the FY 2006 funding cycle to inform programming priorities for the remaining three years of funding.

Competitive Selection Process

MTC released the call for projects on November 9, 2007, with applications due on December 14, 2007. Projects needed to be underway by FY 2009, and applicants needed to be local government authorities or public transportation operators. 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. (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 members Craig Yates and 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.

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. The draft recommendations have been presented to the Partnership Technical Advisory Committee at their February 4 meeting. Following the presentation to EDAC, the recommendations will also be presented to the Transit Finance Working Group, and finally to 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
Recommended Funding from New Freedom Program
FY 2005-06 Large Urbanized Area Apportionment

No.	Sponsor	Project Name	Total Cost	Amount Requested	Recommended Grant Amount
1	AC Transit	Mobile Data Terminals/ Automatic Vehicle Locators for East Bay Paratransit Fleet	\$ 480,000\$	384,000\$	-
2	AC Transit	Paratransit Inventory	\$ 180,000\$	144,000\$	144,000
3	Alameda, City of	Audible and Countdown Signal Access Enhancement	\$ 169,364\$	135,000\$	-
4	Benicia, City of	Taxi Scrip Program Extension	\$ 30,000\$	15,000\$	15,000
5	Berkeley, City of	Ed Roberts Campus/Ashby BART Station Intermodal Accessibility Enhancements	\$ 1,106,568\$	885,254\$	669,405
6	CCCTA	Community Connection Program Expansion	\$ 125,000\$	62,500\$	62,500
7	CCCTA	Comprehensive Mobility Options Inventory	\$ 43,750\$	35,000\$	35,000

Attachment
Recommended Funding from New Freedom Program
FY 2005-06 Large Urbanized Area Apportionment
(continued)

No.	Sponsor	Project Name	Total Cost	Amount Requested	Recommended Grant Amount
8	Contra Costa Co. Employment & Human Services	Contra Costa Volunteer Driver Program Expansion	\$ 153,114	\$ 45,000	\$ 45,000
9	Lafayette, City of	Lamorinda Spirit Van II for Medical and Dental Services	\$ 82,794	\$ 28,500	\$ -
10	LAVTA	LAVTA Travel Training	\$ 159,594	\$ 29,000	\$ -
11	Marin Transit	Mobility Management Office	\$ 144,813	\$ 115,850	\$ -
12	Rio Vista, City of	Route 52 Service Expansion	\$ 11,000	\$ 5,500	\$ -
13	SamTrans	Peninsula Ride Connection	\$ 184,200	\$ 147,200	\$ 147,200
14	San Francisco MTA	NextMuni Audible Arrival Time/Push-to-Talk	\$ 523,000	\$ 418,400	\$ 200,000
15	San Francisco MTA	Paratransit Ramp Taxi Driver Incentive Program	\$ 110,000	\$ 55,000	\$ -
16	VTA	Mobility Options Travel Training	\$ 454,254	\$ 227,127	\$ 227,127
Total			\$ 2,732,331	\$ 1,545,232	\$ 1,545,232
Total Available				\$ 1,545,232	