

Lifeline Transportation Program

Informational Workshop
October 2014

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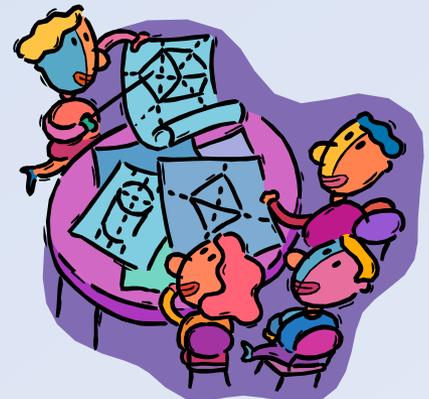


City/County Association of Governments

- What is the Lifeline Transportation and how does it relate to Community Based Transportation Planning (CBTP)?
- Lifeline application requirements
- Overall Schedule

Lifeline Transportation Program

- Initiated by Metropolitan Transportation Commission (MTC) - Guidelines
- Planning Components
 - Community-Based Transportation Planning (CBTP)
 - Coordinated Public Transit- Human Services Transportation Plan
- Investment Component
 - Lifeline Transportation Funds



What is the Metropolitan Transportation Commission (MTC)?

- MTC is the Regional transportation planning, coordinating and financing agency for the nine-county S.F. Bay Area



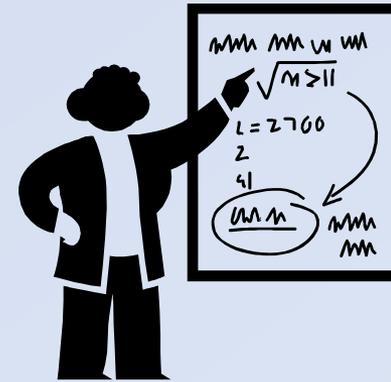
What is C/CAG?

- C/CAG is a Congestion Management Agency (CMA) and each County in the MTC “Region” has one.
- The CMA is responsible for development of a Congestion Management Program (CMP) that monitors levels of congestion on major roads and analyzes the impacts that proposed developments will have on future traffic congestion.
- The Region (MTC) often delegates county level administration of regional programs to the CMAs.



Lifeline Program Administration

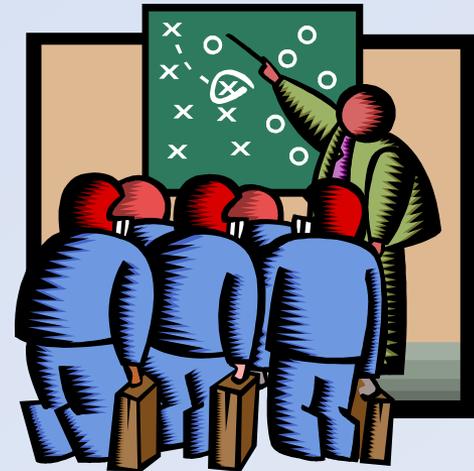
- Program guidelines are adopted by MTC for program oversight



- Program is administered at county level by the Congestion Management Agencies (CMAs)



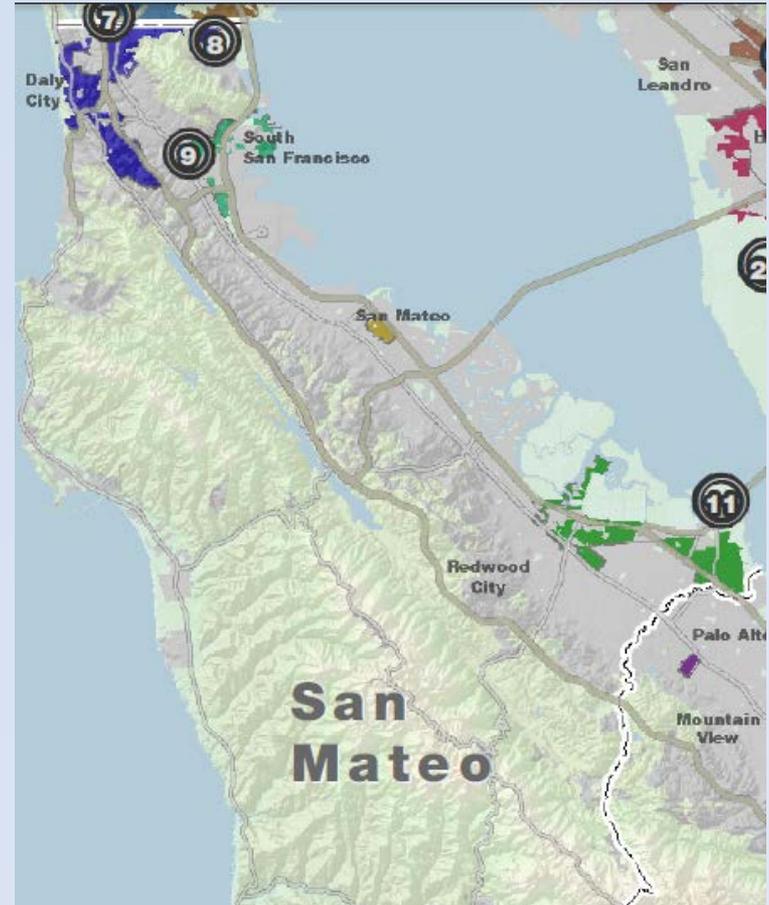
Lifeline Transportation Planning



Communities of Concern

Goal – To identify mobility needs of low-income residents

MTC has identified these highlighted areas as concentrated Communities of Concern



http://gis.mtc.ca.gov/samples/Interactive_Maps/cocs.html

MTC's Lifeline-Related Planning Activities

- Community-Based Transportation Planning Program
- Coordinated Public Transit-Human Services Transportation Plan (“Coordinated Plan”)
- Nine county Welfare-to-Work transportation plans
- Regional Welfare-to-Work Plan

Community-Based Transportation Planning (CBTP) Program

C/CAG invited residents and other stakeholders located in “Communities of Concern” to participate in workshops and surveys to help identify the transportation needs in their communities



CBTP Program

Transportation solutions to address community-identified gaps included:

- Fixed-route transit service, bus shelters/seating
- Auto-oriented solutions — auto repair /car sharing
- Bicycle/Pedestrian solutions
- Shuttles
- Improved local access to transportation information



San Mateo County Community Based Transportation Plans

- ◆ East Palo Alto CBTP
- ◆ Bayshore (Daly City) CBTP
- ◆ North Central San Mateo CBTP
- ◆ South San Francisco/ San Bruno CBTP
- ◆ CBTP Countywide Transportation Plan for Low Income Communities

Find plans at: <http://ccag.ca.gov/programs/transportation/>



Lifeline Transportation Funding



MTC's Lifeline Transportation Program (LTP)

- Intended to fund projects that results in improved mobility for low-income residents.
- Address transportation gaps identified in welfare-to-work, CBTP plans, and other documented strategies emerging through a similar planning process.
- Projects are funded through competitive selection process
- Governed by MTC Resolution 4159
<http://www.mtc.ca.gov/planning/lifeline/>



Lifeline Program Goals

Lifeline guidelines support the selection of projects that:

- Evolve out of a collaborative and inclusive planning process.
- Address transportation gaps or barriers identified through the CBTPs, welfare-to-work plan, Coordinated Public Transit- Human Services Transportation Plan, or Low-Income component of Bay Area's Coordinated Plan.
- Improve a range of transportation choices for low-income persons.



Types of LTP Projects

- Fixed-Route Transit
- Shuttles
- Transit Capital Improvements
- Guaranteed Ride Home/Taxi Projects (JARC only)
- Bus Voucher Programs (needs special agreement)
- Educational Programs (e.g. how to use transit classes)
- Ridesharing and Carpooling (JARC only)

Note: SamTrans will not pass through JARC this cycle. Applicants for JARC activities will have to show proof of a pass through arrangement with another FTA approved transit agency.

Types of LTP Projects



- Definition of Mobility Management (should be no more than one per County)
 - MTC - The development of services and best practices in the coordination of transportation services connecting people needing transportation to available transportation resources within a community. Its focus is the person — the individual with specific needs — rather than a particular transportation mode.
 - FTA – Eligible activities include: the development and operation of one-stop transportation call centers; the operation of transportation brokerages; the integration/ coordination of services for individuals with disabilities, older adults, and low income individuals. (See p.8-4 of MTC’s Coordinated Plan for complete listing)

Definition of Mobility Management



Coordinated Public Transit– Human Services Transportation Plan Update for the San Francisco Bay Area

March 2013



METROPOLITAN
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METROPOLITAN TRANSPORTATION COMMISSION
COORDINATED PUBLIC TRANSIT–HUMAN SERVICES TRANSPORTATION PLAN UPDATE
CHAPTER 8. STRATEGIES TO ENHANCE COORDINATION OF SERVICE DELIVERY

transportation service network comprised of the operations and infrastructures of multiple trip providers in partnership with each other.” More information and details on mobility management activities and functions, as well as a list of online resources, are provided in Appendix C.

Mobility Management: FTA's View

According to guidance issued by FTA, eligible mobility management activities may include:

- The promotion, enhancement, and facilitation of access to transportation services, including the integration and coordination of services for individuals with disabilities, older adults, and low income individuals;
- Support for short term management activities to plan and implement coordinated services;
- The support of State and local coordination policy bodies and councils;
- The operation of transportation brokerages to coordinate providers, funding agencies and customers;
- The development and operation of one-stop transportation call centers to coordinate transportation information on all travel modes and to manage transportation program eligibility requirements and arrangements for customers among supporting programs;
- Operational planning for the acquisition of intelligent transportation technologies to help plan and operate coordinated systems.
- Testing and implementing technology that could account for individual client activity on a vehicle supported with multiple fund sources.

Importantly, mobility management focuses on providing diverse travel options, services and modes. Through partnerships with many transportation service providers, mobility management enables individuals to use a travel method that meets their specific needs, is appropriate for their situation and trip, and is cost-efficient. In other words, a mobility management center is a one-stop shop for transportation services.

At the most basic level mobility management provides information, referrals, and assistance in accessing local and regional transportation services. More advanced mobility managers often work to broker trips for individuals needing transportation from the most appropriate and cost-effective provider, as well as to identify when appropriate transportation resources are not available, and encourage the development of new services and best practices in the coordination of transportation services.

Establishing mobility managers for defined subregional geographic areas throughout the region would help ensure that: (1) staffing resources are provided to carry out coordination activities; and (2) all Bay Area residents with specialized travel needs, regardless of where they live in the region, have access to the customer-focused benefits of mobility management. Ideally, a

mobility manager would assume responsibility for coordinating programs, funding, information, and transportation services of all modes to meet the needs of low-income, elderly and disabled persons. A transit agency could serve as a mobility manager, as could a social service agency, a congestion management agency, a nonprofit agency, or a Consolidated Transportation Service Agency (CTSA).

March 2013

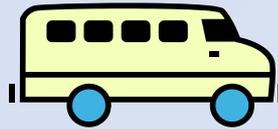
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http://www.mtc.ca.gov/planning/pths/4-13/Coord_Plan_Update.pdf

Ineligible JARC Projects

For the Transit Agencies

- For JARC applicants, recipients may not reclassify existing transit service that have not received funding under the former Section 5316 to qualify for operating assistance.



- See MTC Resolution 4159 Attachment A and FTA C 9030.1E, Chapter IV, Section 5 for details regarding eligible JARC projects.



San Mateo County Lifeline Transportation Program

- Administered by the City/County Association of Governments of San Mateo County (C/CAG)



- Solicit for applications and recommending projects for funding
 - Review progress reports
 - Receive annual updates from grant recipients
 - Participate in regional program evaluations
-
- Lifeline Review Team/ Selection Panel
 - Sample Composition: MTC staff, MTC PAC member, Cities/ County, Transit Authority, Social / Human Services staff, C/CAG staff
 - Role: Review and score applications

Lifeline Investment

- Lifeline funds directed to low-income communities
http://gis.mtc.ca.gov/samples/Interactive_Maps/cocs.html
- Cycle 4 Funding is from FY 2013/14 - FY 2015/16.
Three (3) program years.
- Application, Guidelines, this workshop
<http://ccag.ca.gov/opportunities/call-for-projects/>
- 3 sources of funds (STA, Prop 1B, JARC 5307)
JARC is federal. STA & Prop 1B is state

Lifeline Transportation Program Investment

- Budget for our county:
 - ~\$2.5 million STA and
 - ~\$714,000 in JARC 5307
- Budget for SamTrans \$1,230,533
(Prop 1B limited to lifeline transit capital)

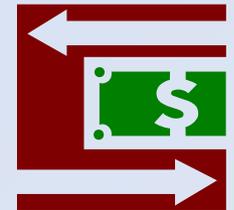
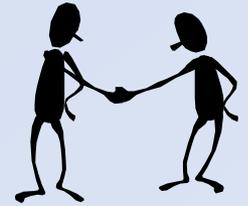


Lifeline Program Fund Sources

STA (State)	Prop 1B (State)	JARC 5307 (Federal)
Transit Capital or Operating	Transit Capital	Capital or Operating
Fixed route, vehicle purchase, shuttle service, technology purchase, bus stop improvements, bus benches, mobility management.	Rolling stock procurement, transit capital rehab and enhancements, new capital projects. Must be consistent with short range transit plan.	Night and weekend services, shuttle service, fixed route expansion, demand services, ridesharing/ carpooling, transit bike facilities, mobility management
Public Transit operators – <u>Others require pass trough with SamTrans</u>	Distributed by formula to Public Transit operators (<u>non-competitive</u>)	<u>Public Transit operators only</u>* (e.g. BART, SamTrans, Caltrain)

Why do we require a SamTrans Letter?

- SamTrans needs to agree to the pass through of funds.
- Sets the sponsor expectation of the pass through process, and
- Makes the project sponsor aware of their administrative responsibilities to SamTrans.

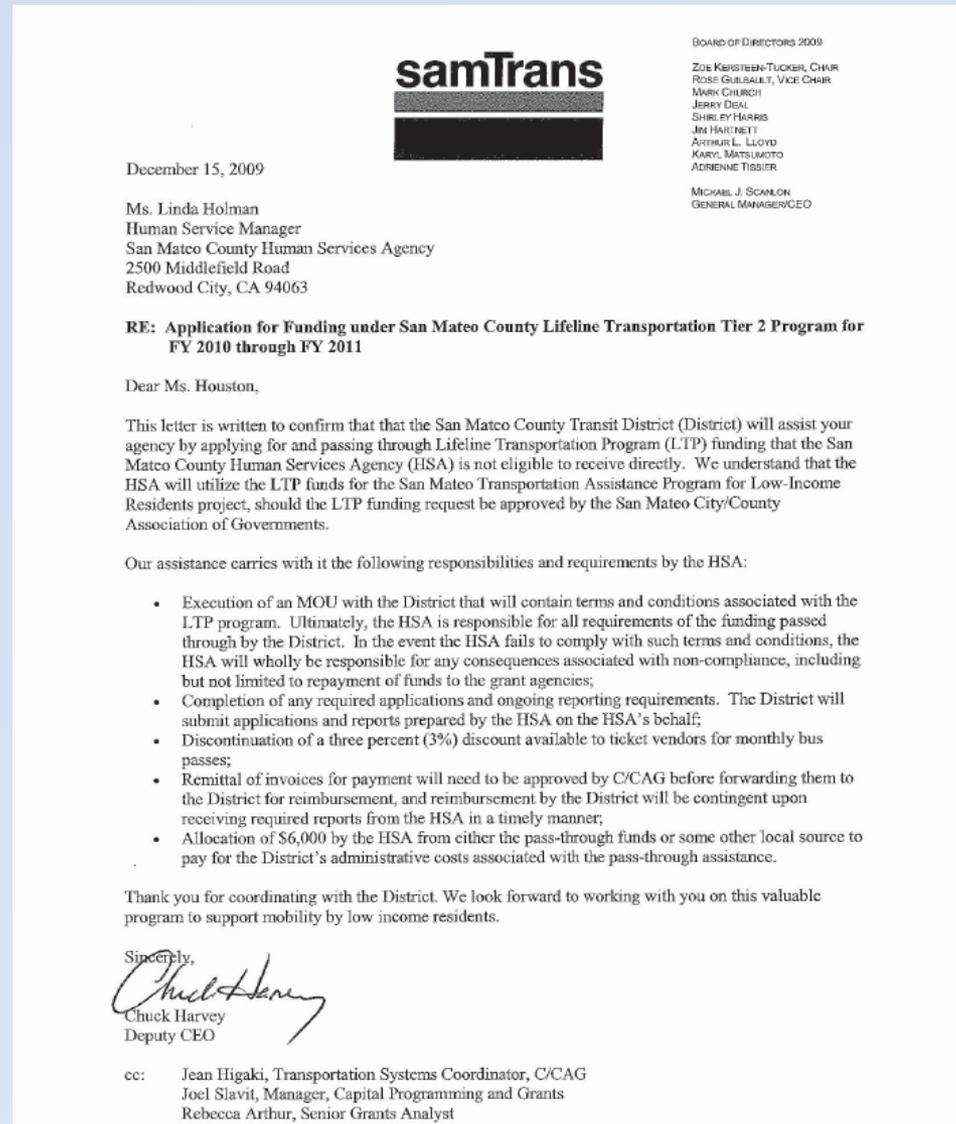


* SamTrans will not pass through JARC this cycle. Applicants for JARC activities will have to show proof of a pass through arrangement with another FTA approved transit agency.

What will the letter look like?

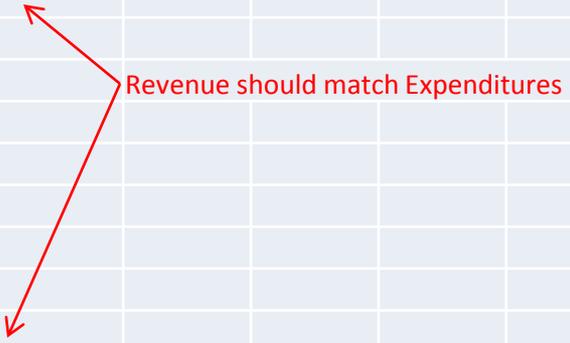
Very generic letter that states your responsibilities:

- Expect to execute an MOU with SamTrans.
- Responsible for all reporting requirements.
- Submit invoices to C/CAG for approval.
- Requires a \$6,000 pass through fee per project.



How does the Budget worksheet work?

Revenue	Year 1	Year 2	Year 3	TOTAL				
Lifeline Program STA	\$80,000	\$85,000	\$90,000	\$255,000				
In-Kind match	\$10,000	\$10,000	\$10,000	\$30,000				
Other Local Match	\$45,000	\$30,000	\$30,000	\$105,000				
TOTAL REVENUE	\$135,000	\$125,000	\$130,000	\$390,000				
Expenditures	Year 1	Year 2	Year 3	TOTAL				
Operating Expenses	\$100,000	\$100,000	\$105,000	\$305,000				
Administrative Expenses	\$25,000	\$22,000	\$22,000	\$69,000				
MOU Execution (PassThrough)	\$6,000	\$ -	\$ -	\$6,000				
Promotion	\$4,000	\$3,000	\$3,000	\$10,000				
TOTAL EXPENSES	\$135,000	\$125,000	\$130,000	\$390,000				
STA Reimbursement								
Percentage of Total Project Cost	59.26%	68.00%	69.23%	65.38%				
				65%	Overall STA grant needs to be <=80% of total project expenditures			
<p>Payments are based on a percentage of expenditure, calculated from the budget. Example agreement will specify that sponsor will invoice for reimbursement at 59.26%, 68%, and 69.23% of project cost incurred respective to year or may use overall project rate.</p> <p>Match cannot be front loaded.</p>								



Demonstrating In-kind match

In-Kind Contribution Report

Report of SERVICES RENDERED, GOODS DONATED, FACILITIES PROVIDED
to the awardee:

Project: _____
Donor: _____
Address: _____

Donor's Signature: _____ Phone: _____
Title: _____
Date(s) services were performed, goods were donated, or facilities provided for project:

Services Rendered:

By _____	hours _____	\$ _____
By _____	hours _____	\$ _____
By _____	hours _____	\$ _____
By _____	hours _____	\$ _____
By _____	hours _____	\$ _____

Others listed on reverse; amount from reverse: _____

Total Services \$ _____

Goods Donated:

Item _____	\$ _____
Item _____	\$ _____
Item _____	\$ _____

Others listed on reverse; amount from reverse: _____

Total Goods \$ _____

Facilities Provided:

Place _____	\$ _____

Others listed on reverse; amount from reverse: _____

Total Facilities \$ _____
TOTAL VALUE \$ _____

APPROVED BY:
Name: _____
Title: _____
Date: _____

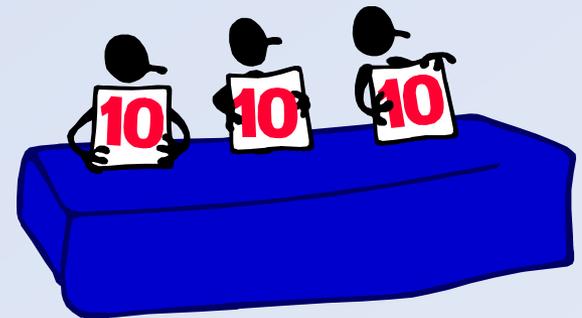
NOTE: PLEASE ATTACH AN EXPLANATION OF THE BASIS FOR THE VALUATION OF EACH ITEM AND ANY SUPPORTING DOCUMENTATION.

- Project sponsors who propose In-kind match must be able to document the valuation of the that match.
- A summary like the one here should be accompanied with a basis for the valuation of each item. Use this sample or create your own
- In-kind backup documentation associated with the project invoice should be attached. See back up for staff time.



Project Selection Criteria

- Project Need/ Goals and Objectives
- Community - Identified Priority
- Implementation Plan and Project Management Capacity
- Coordination and Program Outreach
- Cost-Effectiveness and Performance Indicators
- Project Budget/Sustainability



Next Steps:

Applications due	December 5, 2014
Project selection	mid - December 2015
Committee Reviews	January/ February 2015
C/CAG Board Approval	February / March Board meeting 2015
Board Approved Projects due to MTC	March 13, 2015
MTC Commission Approval of projects.	April 22, 2015
SamTrans or other Transit Operators enter agreements with project sponsors	STA: ~Summer 2015 JARC 5307:~ Fall 2015

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Compliance with Federal Requirements (applies to JARC 5307)

- Applicants should be prepared to abide by all applicable federal requirements (see Cycle 4 Program Guidelines, MTC Res. No. 4159, for details)
 - Examples: Title VI/Civil Rights, DBE, Cost Principles, annual FTA Certifications and Assurances, FTA Master Agreement,
 - Direct recipients are responsible for adhering to FTA requirements through their agreements and grants with FTA directly
 - Pass-through agencies will include language regarding these federal requirements in funding agreements with subrecipients

Invoicing - Back up Information for Staff Time

Job Access and Reverse Commute (JARC) Grant
Personnel Activity Report

Employee Name: Jane Doe

Employee Title: Transportation Program Manager

Pay Period: 1/1/2013 to 1/15/2013*

JARC Project Name	Number of Hours	Description of Work Performed
Employment Shuttle	24	Scheduled drivers; conducted driver training; provided customer assistance

Signature of Employee: _____

Signature of Employee's Supervisor: _____

- The personnel activity reports must be prepared after-the-fact and reflect actual hours worked on the grant, not a budgeted or forecasted amount of hours. (you can use the sample or create your own).

- Direct salary/personnel time (including in-kind) – Must be based on documented payrolls. Salaries and wages must be supported by personnel activity reports signed by the employee and their supervisor.

Summary Sheet

EMPLOYEE NAME	PAY RATE	PAY PERIOD	GRANT	Total Grant Hours	Labor (100%)	Fringe (52.0%)	Total Labor
Jane Doe	\$37.08	1/1/13-1/15/13	Lifeline Cycle 3 JARC	24	889.92	462.76	1,352.68
Employee #2							
Employee #3							
...etc.							
Grand Total				24	889.92	462.76	1,352.68

Note: This table uses a sample fringe rate of 52.0%. Insert your agency's fringe rate and calculate the fringe costs accordingly.

Invoicing - Quarterly Reporting

JOB ACCESS & REVERSE COMMUTE (JARC)

QUARTERLY PROGRESS REPORT

Project Sponsor: _____

Project Name: _____

Lifeline Cycle (1/2/3): _____

Reporting Period: [MM/DD/YYYY] to [MM/DD/YYYY]

1. Costs and Reimbursement Request (Financial Status Report)

- Total costs expended for the Project during the reporting period:
- Dollar amount requested for reimbursement:
- Total costs expended for the Project activities to date:
- Total amount paid by MTC under this Agreement to date:

2. Program Milestones

- Date of new or expanded service
- Date of initiation of other project support services
- Other critical milestones

3. Performance measures related to JARC program goal. (As applicable, please provide the following data for the reporting period):

- Actual or estimated number of jobs that can be accessed as a result of the Project during this reporting period.
- Actual or estimated number of rides (as measured by one-way trips) provided as a result of the Project during this reporting period.

4. Disadvantaged Business Enterprise (DBE) participation

5. Coordination Information

- Financial Partnerships** – Identify funding partners, the amount and sources of matching funds for the following:
 - Human Service Agencies
 - Transit Agencies
 - Employers
 - Non-profit Foundations
 - Others
- Operating Partnerships** – Identify and name partners in providing service:
 - Transit operators
 - Private bus contractors
 - Taxis

Continued

- Private paratransit contractors
- School buses
- Non-profit human service providers
- Community or faith-based organizations
- Other

c. Administration

- Describe actions taken to coordinate and integrate new service within existing transportation services
- If there is an ongoing coordination oversight mechanism, please describe.

6. Project-specific information:

- [See your agency/organization's Funding Agreement, Attachment C for project-specific information that must be reported here.]

- Project sponsors are required to submit a quarterly report with the invoicing.
- Invoicing will need back up information.
- Quarterly reports should show measurable results such as this example.

Questions and Discussions