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C/CAG Lifeline Transportation Program Cycle 8 and CARE PBI Call for Projects

December 11, 2026

Application Due: Friday, January 22, 2027 at 12:00 noon.
Email: Eva Gaye at egaye@smcgov.org.

Table of Contents

1. Introduction 1
2. Call for Projects Schedule 1
3. Workshops and Virtual Office Hours 2
4. Program Objectives 2
5. Applicant and Project Eligibility – Lifeline Transportation Program 3
6. Applicant and Project Eligibility – CARE-PBI Funding 4
7. Application Process 5
8. Cycle 8 Funding Structure 7
9. Pilot Streamlined Renewal Process – Applicable for Lifeline Program Funding ONLY 8
10. Competitive Call for Projects – Lifeline & CARE-PBI 10
11. Funding Availability and Allocation 11
12. Timely Use of Funds 13
13. Evaluation Criteria 13
14. Funding Agreement Process 17

DRAFT

1. Introduction

The City/County Association of Governments of San Mateo County (C/CAG) is pleased to announce the Call for Projects for Cycle 8 of the Lifeline Transportation Program (LTP). Eligible applicants include public agencies, transit agencies, city and county social service agencies, cities, counties, and nonprofit organizations. Additional information regarding program eligibility, funding availability, and application requirements is provided below.

For Cycle 8, C/CAG will implement a three-year funding cycle covering Fiscal Years (FY) 2026/27 through 2028/29, rather than the traditional two-year funding cycle. This approach is intended to streamline the application process, reduce the administrative burden on local agencies by decreasing the frequency of funding applications, and increase the total amount of Lifeline funding available through a single call for projects. The three-year funding cycle will also provide greater funding predictability and support longer-term project planning and implementation.

Approximately **$4.9 million** in State Transit Assistance (STA) funding is available for LTP Cycle 8. Of this amount, **$782,000** is allocated to the Pilot Streamlined Renewal Process, and approximately **$4.1 million** is available through the Competitive Call for Projects.

To streamline the application process and better align funding opportunities with shared program goals, Community Action Resource and Empowerment Program Participatory Budgeting and Implementation (CARE-PBI) funding has also been incorporated into the LTP Cycle 8 Competitive Call for Projects. Both funding sources aim to support projects that benefit Equity Priority Communities (EPCs) and/ or C/CAG Equity Focus Area. An additional **$1.2 million** in CARE-PBI funding is available for eligible capital projects.

The two sources combined are expected to provide over **$6.1 million** for the coordinated call for projects.

2. Call for Projects Schedule

The following information is also available on C/CAG's website: https://ccag.org/funding/regional/.

DRAFT

Table 1: Project Schedule

Event	Date
Call for Projects Issued	December 11, 2026
Applicant Workshop	Tuesday, December 15, 2026
Applicant Office Hours	January 6th and 7th, 2027
Public Workshop	December 16, 2026 and January 5, 2027
Applications Due	Friday, January 22, 2027
Selection Panel Reviews Applications	January 27- February 15, 2027
C/CAG Committees Consider Recommendation	March 18th and 29th, 2027
C/CAG Board Considers Recommendations	April 8, 2027

Workshops and Virtual Office Hours

C/CAG will hold workshops and office hours to review application requirements and answer questions about this funding opportunity. Registration is not required.

Table 2: Engagement

Meeting	**Date**	Zoom
Applicant Workshop	10am, Tuesday, December 15, 2026	Zoom Meeting Link
Virtual Office Hours	3pm, Wednesday, January 6, 2027	Zoom Meeting Link
	1pm, Thursday, January 7, 2027	Zoom Meeting link
Public Workshops	5:30pm, Wednesday, December 16, 2026	Zoom Meeting Link
	6pm, Tuesday, January 5, 2027	Zoom Meeting Link

3. Program Objectives

The Lifeline Transportation Program supports transportation projects that address mobility needs identified through Community-Based Transportation Plans (CBTPs) and other relevant local planning efforts serving low-income communities. The program is intended to improve access to essential destinations and services, including employment, education, healthcare, shopping, and other community resources.

Projects must demonstrate a direct benefit to low-income communities in San Mateo County, include measurable outcomes and deliverables, and demonstrate the project sponsor's capacity to successfully implement the proposed project and reach the intended population. Projects must also be identified in Community-Based Transportation Plans (CBTP) or other substantive local planning efforts involving focused outreach to low-income populations such as countywide or regional welfare-to-work transportation plans, the Coordinated Public Transit-Human Services Transportation Plan or other documented assessment of need.

DRAFT

Funding for this call will support projects that advance the objectives of the Lifeline Transportation Program and CARE-PBI, including:

- Improving mobility and transportation access for low-income communities;
- Addressing transportation needs identified through Community-Based Transportation Plans (CBTPs) or other relevant planning efforts;
- Maintaining effective transportation services that provide demonstrated benefits to eligible communities;
- Supporting projects with measurable outcomes and clearly defined deliverables;
- Promoting efficient and responsible use of limited Lifeline funding;
- Supporting projects that demonstrate organizational and financial capacity for successful implementation; and
- Project is consistent with one or more of the following: Plan Bay Area 2050+, Coordinated Public Transit-Human Services Transportation Plan, Regional Safety/ Vision Zero Policy, Equity Platform.

4. Applicant and Project Eligibility – Lifeline Transportation Program

a. Applicant Eligibility

- Eligible applicants include STA recognized transit operators, Consolidated Transportation Service Agencies (CTSAs); and cities and counties that are eligible to claim Transportation Development Act (TDA) Article 4, 4.5 or 8 funds.

- Nonprofit organizations are only eligible for STA funds if they partner with an eligible STA recipient (SamTrans) that is willing to serve as a recipient of the funds and pass-through the funds to the nonprofit organization.

- Private for-profit entities are not eligible to receive Lifeline Transportation Program funds.

b. Project Eligibility

Eligible Projects include (but are not limited to):

- Transit Operations Projects: Examples of operating projects may include, but are not limited to, new or enhanced fixed route transit services, transit voucher programs, mobility programs, educational and outreach projects, restoration or continuation of lifeline-related transit services, shuttles, and hiring a mobility manager to improve transportation access for residents of low-income communities.

- Transportation Capital Projects: Examples of eligible capital projects include, but are not limited to, purchase of vehicles, provision of bus shelters, benches, lighting,

DRAFT

active transportation improvements or other enhancements, and micromobility programs.

c. Fund Administration

If your agency is not an STA-recognized transit operator, including cities, counties, and other eligible public agencies, you must obtain a concurrence letter from SamTrans to apply for funding. The concurrence letter, serving as proof of sponsorship, must be submitted with your application.

Please note that SamTrans requires a $6,000 administrative fee for passing through STA funds, which must be included in your proposed project budget..

5. Applicant and Project Eligibility – CARE-PBI Funding

Community Action Resource and Empowerment – Participatory Budgeting and Implementation (CARE-PBI) funding is available exclusively for the implementation of eligible transportation projects identified through Community-Based Transportation Plans (CBTPs) or other qualifying community-driven planning processes. Funding supports community-identified transportation priorities that improve mobility, accessibility, and transportation equity in underserved communities. Funds may only be used for eligible project implementation activities and may not be used for planning activities unrelated to implementation.

a. Applicant Eligibility

Local jurisdictions, counties, transit agencies, and federally recognized Tribal governments are eligible to apply for PBI funds.

Non-profit organizations are only eligible if they partner with an eligible One Bay Area Grant (OBAG) recipient (e.g., CTA, transit operator) that is willing to serve as the recipient of the funds.

Private for-profit entities are not eligible to receive CARE-PBI funding.

b. Project Eligibility

Eligible projects must meet the following criteria:

- Consist of capital transportation improvements consistent with the Complete Streets and Community Choice categories defined in MTC Resolution No. 4740.
- Be located within an Equity Priority Community (EPC). Projects located outside an EPC may be eligible if they serve the program's intended beneficiaries, including older adults, individuals with low incomes, people with disabilities, and communities of color. In such cases, applicants must clearly demonstrate a direct connection between the project location and the communities served.

DRAFT

- Be identified through a Community-Based Transportation Plan (CBTP), an MTC-funded Participatory Budgeting (PB) process, a locally led PB process, or a comparable community-driven planning effort that includes community voting or project prioritization.
- Have sufficient funding secured for full project implementation, either through CARE-PBI funding alone or in combination with other committed funding sources.
- Be construction-ready at the time of project nomination.

c. Program Requirements and Timeline

All capital projects must comply with applicable CARE-PBI program requirements, funding eligibility criteria, and implementation timelines as per MTC's Resolution 4604: MTCResolution4604_Appendix_4_PBI_Guidelines.pdf. Projects requesting $250K or more in funding must also submit a MTC's Complete Streets checklist form.

Applicants seeking funding for capital projects must complete and submit both the MTC CARE PBI Application and the C/CAG Lifeline Transportation Program Application to be considered for funding. Both programs fund eligible capital projects, and the Lifeline application allows C/CAG to consider your project for funding on a faster timeline. Each program has its own requirements and evaluation criteria.

C/CAG will submit CARE-PBI project nominations to the Metropolitan Transportation Commission (MTC) by June 30, 2027. The MTC Commission is anticipated to consider adoption of the recommended projects in Fall 2027.

6. Application Process

a. Application Limit

Each project sponsor may submit up to four (4) applications: two (2) for capital projects and two (2) for operating projects.

If an agency submits a group application covering several independent projects that are similar in nature on behalf of multiple jurisdictions, the joint application counts toward the four-application limit for each participating jurisdiction. Additionally, a separate scope, budget, match, and funding request for each individual project will be required.

b. C*ombined Competitive Application*

C/CAG will administer a coordinated Competitive Call for Projects for Lifeline Transportation Program and CARE-PBI funding. The two programs will share a common application period, initial application review process, selection panel, and general evaluation framework. However, each program will retain its own eligibility

DRAFT

requirements, application documentation, funding restrictions, and approval procedures.

Applicants must submit the following materials based on the funding source requested:

- Lifeline Transportation Program: Complete the C/CAG Lifeline Transportation Program application and provide all required supporting documentation.

- CARE-PBI: Complete both the C/CAG Lifeline Transportation Program application and the MTC CARE-PBI application, along with any additional documentation required under applicable CARE-PBI guidelines.

All competitive applications will undergo an initial eligibility screening to determine compliance with the requirements of the applicable funding source.

c. Review Process

Lifeline applications will then be evaluated by the selection panel using the applicable Cycle 8 evaluation criteria. CARE-PBI projects will also be reviewed for compliance with CARE-PBI-specific eligibility, community prioritization, project readiness, and implementation requirements.

Projects will be ranked and considered for funding within their respective funding pools. C/CAG will develop funding recommendations based on application scores, funding eligibility, demonstrated project benefits, and available resources. Some Capital projects will receive Lifeline funding depending on their score and project start date.

Final project approval and fund administration will follow the requirements of each funding source. CARE-PBI nominations will be subject to additional MTC review and approval.

DRAFT

Table 3: Lifeline Transportation Program and CARE-PBI Application Review Process

Process	Lifeline Transportation Program (STA)	CARE-PBI
Eligible Project Types	Operating and capital projects	Capital projects only
Application Requirements	C/CAG Lifeline Transportation Program application	Both C/CAG Lifeline and MTC CARE-PBI applications
Eligibility Screening	Lifeline and STA eligibility requirements	CARE-PBI eligibility and project readiness requirements
Evaluation Process	Shared selection panel	Shared selection panel
Scoring Criteria	Operating or capital project evaluation criteria, as applicable	Capital project evaluation criteria, plus CARE-PBI-specific requirements
Project Ranking	Ranked within applicable Lifeline funding pool	Ranked within CARE-PBI funding pool
Funding Recommendations	C/CAG staff and committee review, followed by Board consideration	C/CAG staff and committee review, followed by Board consideration
Final Approval	C/CAG Board approval, subject to applicable STA requirements	C/CAG Board recommendation and subsequent MTC final selection and approval
Funding Administration	Through an eligible transit agency/pass-through agreement	Subject to applicable CARE-PBI and MTC requirements

7. Cycle 8 Funding Structure

Cycle 8 Lifeline funds will be considered through a Pilot Streamlined Renewal Process and a Competitive Call for Projects. The two-pathway approach is intended to maintain continuity of established transportation services while preserving competitive funding opportunities for eligible projects serving low-income communities throughout San Mateo County.

The Pilot Streamlined Renewal Process is limited to eligible SamTrans operating projects for Cycle 8 in recognition of increasing shuttle operating costs and the resulting uncertainty regarding the number of shuttle routes that can be supported with available funding. As reflected in the Transportation Authority's Shuttle Study, higher operating costs may affect the financial sustainability of existing shuttle services and the ability to maintain current service levels. Accordingly, other jurisdictions, including those with previously funded shuttle services, will remain eligible to apply through the Competitive Call for Projects. This approach maintains funding flexibility, supports equitable access to competitive funding, and allows C/CAG to reassess its funding strategy in future cycles based on the study's findings.

DRAFT

The streamlined pathway does not establish an entitlement to Lifeline funding, nor does it guarantee that an eligible project will receive the same funding amount awarded in a prior cycle.

8. Pilot Streamlined Renewal Process – Applicable for Lifeline Program Funding ONLY

The Streamlined Renewal Process is intended to provide an efficient mechanism for C/CAG to consider continued funding for established projects operational in nature without requiring submission of a complete competitive application each funding cycle. For this pilot program as part of Cycle 8, SamTrans is the only eligible applicant and will be required to complete a recertification form. The two identified SamTrans services have an established history of Lifeline support and are proposed for streamlined consideration based on their continuing operating function, consistent service scope, and demonstrated performance. The funding amount was determined based on the average annual C/CAG Lifeline award over the preceding three funding cycles.

The process recognizes the recurring nature of established transit operations while maintaining C/CAG oversight of project eligibility, performance, expenditures, and shuttle service to Lifeline-eligible communities.

For Cycle 8, streamlined consideration is limited to established eligible SamTrans operations projects identified by C/CAG as meeting these requirements.

a. Pilot Streamlined Renewal Eligibility

Eligibility for streamlined consideration is project-specific and not sponsor-wide. A SamTrans operations project may be considered through the streamlined process only if C/CAG determines that the project:

- Is an established operations project previously funded through multiple cycles of the Lifeline Transportation Program;
- Continues to serve Lifeline-eligible communities;
- Continues to satisfy applicable Lifeline and STA eligibility requirements;
- Remains substantially consistent with the scope and purpose previously approved for Lifeline funding;
- Demonstrates satisfactory project performance and compliance;
- Has not experienced material changes that warrant a new competitive review; and
- Meets any additional certification or documentation requirements established by C/CAG.

b. Renewal Documentation and Certification

DRAFT

SamTrans will be required to provide documentation or certification sufficient for C/CAG to verify continued eligibility. At a minimum, C/CAG will review:

- Current project scope and service description;
- Communities and populations served;
- Service levels and operating characteristics;
- Prior and current project performance;
- Ridership or utilization, as applicable;
- Expenditures and use of previously awarded Lifeline funds;
- Compliance with reporting and funding agreement requirements;
- Proposed Cycle 8 funding need; and
- Any material changes affecting the project.

C/CAG will review the certification and supporting information as part of the applicable Lifeline and STA funding review process.

c. Circumstances Requiring Competitive Review

C/CAG may determine that an otherwise eligible streamlined project must participate in the competitive Call for Projects if circumstances warrant additional review. Such circumstances may include, but are not limited to:

- A substantial change in project scope or service;
- Significant service reductions or restructuring;
- Failing to meet established performance metrics;
- Compliance or reporting deficiencies;
- Discontinuation or significant modification of the previously funded service;
- Material changes in the population or communities served;
- Changes affecting the project's eligibility for Lifeline or STA funding; or
- Other circumstances that C/CAG determines warrant evaluation through the competitive process.

If a project does not satisfy the requirements for streamlined renewal, C/CAG will notify the project sponsor that a full competitive application is required for further funding consideration.

d. Funding Determination

Streamlined renewal does not guarantee continued funding or establish a permanent entitlement for any project or sponsor. Funding will remain subject to:

- Continued project and funding-source eligibility;

DRAFT

- Availability of Lifeline and STA funds;
- Demonstrated funding need;
- Satisfactory project performance;
- Compliance with applicable requirements;
- C/CAG staff review and funding recommendations;
- Applicable committee consideration; and
- C/CAG Board approval.

Prior funding levels, prior awards, or sponsor funding requests do not establish a guaranteed Cycle 8 award amount.

9. Competitive Call for Projects – Lifeline & CARE-PBI

C/CAG will use a coordinated evaluation process for eligible Lifeline and CARE-PBI competitive applications. Applications will be evaluated by the same selection panel using the applicable operating or capital project scoring criteria established for Cycle 8.

Although the evaluation framework is shared, projects must independently satisfy the eligibility, documentation, and implementation requirements of the funding source requested. CARE-PBI applications will be evaluated under the capital project criteria and must also demonstrate compliance with CARE-PBI-specific requirements.

Projects will be ranked and considered for funding within their respective funding pools. The shared evaluation process does not combine funding sources or eliminate funding-source-specific restrictions.

a. Competitive Process Eligibility

Projects may include new projects, expansions or modifications of existing projects, and previously funded projects that are not eligible for streamlined renewal, provided that the proposed activities satisfy all applicable Lifeline Program requirements.

All eligible projects that are not approved for consideration through the Streamlined Renewal Process must participate in the Competitive Call for Projects.

b. Application Evaluation

C/CAG will evaluate eligible competitive applications using the scoring criteria established for Cycle 8. Evaluation factors may include:

- Demonstrated transportation need;
- Benefit to low-income communities;

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- Consistency with a CBTP or other relevant planning effort;
- Project effectiveness and anticipated outcomes;
- Project readiness and implementation feasibility;
- Cost effectiveness and reasonableness of the funding request;
- Applicant experience and organizational capacity;
- Clearly defined performance measures and deliverables;
- Financial sustainability and availability of other funding resources, where applicable; and
- Compliance with applicable Lifeline Program requirements.

c. Group Application Evaluation

SamTrans may submit a group application for shuttle services on behalf of a number of project sponsors. The group application will require detailed route information and will be scored individually.

The $670,000 maximum grant amount applies to each application, regardless of whether it is submitted independently or as a group application. Each sub-application must identify its own project budget, requested funding amount, and local match. The local match will be determined based on each project's location. C/CAG may award Lifeline Program funding to all or some of the projects in a group application based on each project's eligibility and score. C/CAG may also award less than the requested amount for any individual project based on its ranking.

Submission of a group application does not guarantee funding of all proposed projects.

C/CAG may request additional information or clarification from applicants during the evaluation process. Submission of an application does not guarantee an award.

10. Funding Availability and Allocation

The Lifeline Transportation Program Cycle 8 will utilize two funding sources: State Transit Assistance (STA) funds and Community Action Resource and Empowerment (CARE) Program Participatory Budgeting and Implementation (PBI) funds (CARE-PBI).

If total funding requests exceed available resources, C/CAG may recommend awards below the requested amounts, establish funding caps, or apply other funding limitations to balance program priorities with available resources.

C/CAG reserves the right to adjust the fund type and recommended amounts based on project eligibility, project performance, application scores, funding availability, and other applicable program considerations. C/CAG will recommend eligible projects by score within each funding pool, subject to the published award limits. C/CAG may recommend a reduced award when the applicant has identified a deliverable reduced scope, and demonstrated that the reduced scope

DRAFT

retains the benefits underlying its score. If the remaining funds cannot support a viable award, C/CAG may consider the next eligible project that can be delivered with those funds.

a. State Transit Assistance (STA) Funding

Approximately **$4.9 million** in STA funding is available for LTP Cycle 8. Funding will be allocated through the Pilot Streamlined Renewal Process and the Competitive Call for Projects, as outlined below:

Table 4: Available Lifeline Transportation Funds (STA Funding)

Funding Category	Available Funding
Pilot Streamlined Renewal Process ***(*SamTrans Only)***	**$782,000**
Competitive Process • 70% for Operating Projects • 30% for Capital Projects	**$4.1million** • $2.88 million Operating Projects • $1.24 million Capital Projects
Minimum and Maximum Grant Awards	
$55,000 to $130,000	for transit-based educational and outreach projects
$110,000 to $670,000	for shuttle and operation projects, transit or active transportation, transit pass programs, and fixed transit route services
$110,000 to $670,000	for capital projects

b. CARE-PBI Funding

A total of **$1.2 million** in CARE-PBI funding is available for eligible capital transportation improvement projects. Funding is restricted to projects meeting applicable CARE-PBI eligibility and implementation requirements.

Table 5: CARE-PBI Funds Available

Funding Category	**Available Funding**
Competitive Process • 100% for Capital Projects	$1.2 million
Minimum Award	
$50,000	For Capital Projects

DRAFT

c. *Lifeline (STA Funding) and CARE-PBI Local Match*

Projects must meet the minimum required local contribution based on project location. The local match is calculated based on the project's total cost, which includes the $6,000 administrative fee to SamTrans.

Table 6: Local Match Requirement

Project Location	Minimum Local Match
MTC Equity Priority Communities, C/CAG Tier 1 Equity Focus Areas	11.47%
C/CAG Tier 2 Equity Focus Areas	15%
All Other Areas	20%

11. Timely Use of Funds

a. Lifeline Transportation Program

All Lifeline Transportation Program State Transit Assistance (STA) funds must be fully expended within three (3) years of the date the funds are programmed by MTC or the date the agreement with the pass-through agency is executed, whichever is applicable.

Funds may be used retroactively for eligible project expenditures incurred on or after July 1, 2026, subject to applicable program requirements. **Any expenditures incurred prior to the execution of a funding agreement for Cycle 8 are undertaken at the project sponsor's sole risk and do not guarantee reimbursement or funding approval.**

As the program administrator, C/CAG is responsible for monitoring the timely use of funds and the consistency with the original purpose, scope, and budget approved by the C/CAG Board.

b. CARE-PBI

All CARE-PBI funds must be fully expended within three (3) years of the date the funds are programmed by MTC or the date the agreement with the pass-through agency is executed, whichever is applicable.

12. Evaluation Criteria

Following an initial screening for applicant and project eligibility, eligible applications will be reviewed and scored by a selection panel using the criteria below. A maximum of **100 points** is available.

a. Project Need/Goals and Objectives (25 pts)*:* Projects will be evaluated based to the extent to which they demonstrate alignment with Program Objectives and identify the transportation need.

DRAFT

- Describe the project's goals and objectives and demonstrate consistency with the goals of the Lifeline Transportation Program (and CARE-PBI for Capital Projects) including how the project will improve transportation access and mobility for low-income residents.
- Identify the relevant planning effort, data, community input, or other documentation supporting the identified need.
- Describe the transportation need, service gap, infrastructure deficiency, safety concern, or mobility barrier the proposed project is intended to address and explain how the proposed project will respond to that need.
- Provide information demonstrating the extent of the transportation need, such as the population affected, existing service limitations, transit dependency, gaps in first/last-mile connections, or barriers to accessing employment, education, healthcare, transit, and other essential destinations.
    - For Capital Projects, provide information and data (where available) demonstrating the extent of the transportation need such as collision history, gaps in pedestrian and bicycle networks, inadequate transit access, missing sidewalks or inaccessible facilities, and infrastructure conditions.
- Applicants seeking funding for transit pass, voucher, fare assistance, or similar mobility programs, including countywide programs, must demonstrate how the proposed funding will provide a direct and measurable benefit to low-income residents in Equity Priority Communities (EPCs).

***b. Community-Identified Priority (15 pts)*:** Projects will be evaluated based on the extent to which they address transportation needs identified through a **Community-Based Transportation Plan (CBTP)** or another substantive planning effort that included meaningful engagement with low-income communities.

- Identify the applicable CBTP or other planning document and describe how the proposed project responds to an identified transportation need or priority that aligns with the transportation goals for EPCs. (Projects may also address transportation needs identified through countywide or regional planning efforts, including the Coordinated Public Transit-Human Services Transportation Plan.)
    - For Capital Projects, supporting documentation may include the current iteration of Plan Bay Area, Coordinated Public Transit-Human Services Transportation Plan, regional safety / Vision Zero policy, and Equity Platform, or other relevant analyses where the project takes place in an equity community.
- Describe the meaningful engagement with low-income communities associated with the planning effort (project design effort for Capital Projects).

DRAFT

- Describe the populations and geographic areas expected to benefit from the project, including residents of designated Equity Priority Communities (EPCs) and/or C/CAG Equity Focus Areas (EFAs), where applicable.
- Explain how the project will provide a direct and meaningful benefit to low-income residents, such as reducing the cost of transportation burden, expanding access to transportation options, improving first/last mile connectivity to transit, or other quality of life improvements related to transportation improvements, safety, accessibility, and cost.

c. ***Implementation Plan and Project Management Capacity (25 pts)*:** Projects will be evaluated based on the extent to which they provide a clear implementation plan and demonstrate capacity to successfully execute the project.

- Describe the proposed service or capital project, major activities, anticipated service levels where applicable, project risks and mitigation strategies, and implementation approach.
- Provide a project schedule with milestones, responsible parties, anticipated completion dates and demonstrate that the proposed project can be implemented within the applicable funding period.
- **Capital Projects ONLY** - Provide a clear implementation plan identifying the current project development phase, major activities, milestones, responsible parties, and anticipated completion dates. The plan should address applicable project development and delivery requirements, including preliminary engineering, environmental review and clearance, design, right-of-way acquisition, utility coordination, permitting, procurement, construction, and other necessary approvals or agreements, as applicable.
- **Capital Projects ONLY** - Describe the project's readiness to proceed and identify any outstanding issues, dependencies, or risks that could affect implementation, along with strategies to address them. Relevant supporting materials may include preliminary or final design plans, cost estimates, environmental documentation, right-of-way status, and anticipated construction schedules.
- Demonstrate sufficient organizational, administrative, and financial capacity to manage the project and comply with applicable funding requirements. Relevant experience may include administering transportation programs, serving low-income communities, managing state or federal transportation funds, and successfully completing similar projects.

DRAFT

d. ***Coordination and Program Outreach (15 pts)*****:** Projects will be evaluated based on the extent to which they plan to coordinate with key partners and agencies as well as conduct outreach using a variety of strategies to engage equity priority communities.

- Describe your approach to coordinating with relevant transportation providers, public agencies, community-based organizations, social service providers, employers, and other project stakeholders.
- Identify key project partners and stakeholders and describe their respective roles in project implementation, coordination, and outreach.
- Describe how the proposed service or project will be marketed and communicated to the intended population.
- Describe outreach methods that address language, technology, physical accessibility, and other barriers to transportation information and services.
- **Capital Projects ONLY** – Where relevant, applicants should describe how the project will coordinate with existing or planned transportation facilities and services to improve network connectivity, access to transit, and the overall effectiveness of the investment.

e. ***Cost-Effectiveness and Performance Indicators (10 pts):*** The project will be evaluated based on the applicant's ability to demonstrate that the proposed approach addresses the transportation need and includes appropriate performance metrics to track the project's success.

- Explain why the proposed approach is the most appropriate way in which to address the identified transportation need and is a cost-effective approach.
- **Capital Projects ONLY** – Describe the anticipated benefits of the project in relation to its estimated cost, including improvements in transportation safety, accessibility, connectivity, infrastructure condition, reliability, or access to essential destinations, as applicable. Where feasible, applicants should provide supporting data or analysis demonstrating the expected benefits relative to the existing conditions and available alternatives.
- Identify clear, measurable outcome-based performance indicators and targets to track the effectiveness of the service in meeting the identified goals.
- Describe how performance data will be collected, monitored, and evaluated.
- Explain the corrective steps that will be taken if performance goals are not achieved.

f. ***Project Budget/Sustainability (10 pts):*** The project will be evaluated based on the extent to which it presents reasonable project cost estimates, demonstrates funding availability for the local match, and a plan to sustain the project beyond the grant period.

- Describe anticipated project expenditure and revenues and explain the reasonableness of the requested funding.

DRAFT

- Identify matching funds and supporting documentation.
- Explain the applicant's plan for financial sustainability beyond the grant period.
- Identify potential future funding sources and long-term efforts to maintain or sustain the project.

g. ***Performance Metrics for Previously Funded Lifeline Projects ONLY*:** The project's performance to date will be considered based on the following assessment. Include the following information for every year in which funding was received for this project.

- Briefly discuss any relevant background information for the project including project origin, goals, transportation gaps, and community needs.
- Describe key goals, performance metrics, and progress made toward achieving the established targets.
- Explain any material changes during the previous grant cycle and why these occurred.
- Describe any project risks, challenges, data inconsistencies, and limitations; mitigation strategies implemented to address them, and the outcomes achieved.
- Describe which populations in equity priority communities benefited from the project or service.
- Explain the benefits of this project or service and include any supporting data, such as ridership or utilization.

13. Funding Agreement Process

Upon C/CAG Board approval of project nominations, sponsors will then work with SamTrans to enact a pass-through agreement for the Lifeline Transportation funding.

For funding under the CARE-PBI program, upon C/CAG Board approval of project nominations, C/CAG will submit the project nomination list to MTC for approval by June 30, 2027. The MTC Commission will approve the project nomination list in Fall 2027.

DRAFT