

### Proposed Key Changes to Lifeline Guidelines

The Metropolitan Transportation Commission (MTC) must meet its commitment to advance regional transportation equity under Plan Bay Area 2040 by addressing mobility and public transportation access needs of low-income and other underserved Bay Area residents. In particular, we urge MTC to revise the existing guidelines to the Lifeline Transportation (Lifeline) Program and the Community-based Transportation Planning (CBTP) Program so that MTC could fulfill this commitment. The following principles and associated key recommended changes to the two program guidelines correspond with and elaborate on recommendations included in the 6 Wins Network Proposal (Proposal) that we shared in March 2017 (last updated in August 2017).

#### *Principles*

**Principle 1: Engage and build leadership by low-income and communities of color.** Low-income and other underserved residents are the experts of their own transportation needs. Therefore, building robust community engagement and leadership will fulfill Lifeline’s purpose of funding “community-based transportation projects” that “result in improved mobility for low-income residents,”<sup>1</sup> and similarly the CBTP Program’s purpose of meeting “transit needs in economically disadvantaged communities”.<sup>2</sup> Such engagement has the potential to develop capacity and civic leadership among community members to engage in transportation decision-making.

**Principle 2: Ensure community decision-making.** Low-income residents and other underserved residents and community-based organizations (CBOs) and/or non-profit organizations that work with these residents must also have decision-making power in every step of implementing both programs, including process design, needs assessment, project development, and project selection.

**Principle 3: Ensure that low-income and underserved residents determine priorities.** Lifeline funds should be spent on projects that address the current priority needs and investments identified by low-income and other underserved residents under a recent CBTP or equivalent planning process.

**Principle 4: Require transparency and accountability in process and outcomes.** Information about each stage of the Lifeline and CBTP process should be publicly available and accessible by low-income and underserved residents. This will enable community oversight in accordance with Principles 1 through 3 and provide a mechanism for agency reflection, accountability, and improvement.

**Principle 5: Build relationships between residents and government.** A more participatory Lifeline program will bring community residents, CBOs, and local and regional government staff together in ways that deepen trust and the practice of democracy.

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<sup>1</sup> Metropolitan Transportation Commission. *Lifeline Transportation Program Cycle 4 Guidelines*, at p.3.

<sup>2</sup> Metropolitan Transportation Commission. *Community-based Transportation Planning Program Guidelines*, at p.1.

## ***Specific Recommendations***

We are pleased to see that MTC is updating guidelines for both programs to encourage and incentivize congestion management agencies (CMAs) and other relevant stakeholders to adopt a Participatory Budgeting (PB) process for implementing the two programs. (MTC should include an appendix outlining how the PB process can be used for each program as we have proposed.) For those CMAs that do not use PB, we recommend that MTC adopt the following key recommendations – please see our Proposal for a more complete discussion of all recommendations:

### Lifeline Guidelines

1. **Community Engagement Plan.** Require CMAs to adopt and implement a Community Engagement Plan with at least 3 best practices that will result in maximum participation and leadership by low-income residents and CBOs that work with these residents. (See language we have proposed in Appendix 2 (Section d) of the current Lifeline guidelines.)
2. **Community Prioritization.** Require CMAs to prioritize for funding projects ranked highest by low-income residents in CBTPs or through other equivalent local planning that have been completed within the past five years. (See proposed language in Appendix 2 (Section b).)<sup>3</sup>
3. **Reporting Requirements.** Require CMAs to report on performance metrics for each project, in particular whether the project has primarily resulted in mobility or transportation access for low-income people, as well as the specific proportion of project beneficiaries that are low-income. Community engagement plans and funding reports should be posted on MTC and CMA websites. (See proposed language in Sections 16, Appendix 2 (Section e), and a new section on reporting requirements.)

### CBTP Guidelines

1. **Consultants must be CBOs and/or non-profit organizations.** Require CMAs to conduct CBTP planning in partnership with CBOs and/or non-profits that work with low-income and other underserved residents as consultants, and to prioritize contracts with CBOs and/or non-profits (as opposed to for-profit consultants). CBOs should receive funding for participating in the planning process. The 10% of CBTP planning funding that MTC proposes to set aside for community engagement should be reserved for CBOs that work directly with low-income and other underserved residents. (See proposed language in Sections 4 and 6 of the 2002 CBTP guidelines.)
2. **Steering Committee.** Require CMAs to work with CBOs and/or non-profits to establish a Steering Committee to design and oversee a collaborative CBTP planning process. The majority of Steering Committee members must be low-income and other underserved residents, and CBOs that work with these residents. (See proposed language in Sec. 8.)
3. **Community Engagement Plan.** Parties responsible for CBTP planning must adopt a Community Engagement Plan with a minimum of 3 best practices for involving low-income residents and CBOs that work with these residents. The Community Engagement Plan must include a process for ranking low-income and other underserved residents' needs, and prioritize associated project into tiers based on the needs identified by these residents. (See proposed language in Sec. 8.)
4. **Action Plan.** Require CMAs to create an action plan for implementing all projects within five years of the completion of CBTPs. The action plan should include specific implementation timelines and a list of viable funding sources for each project identified to have the highest priority level. (See proposed language in Section 8, in particular the paragraph on the primary elements of a CBTP.)

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<sup>3</sup> In addition, the project selection criteria on project goals, community-identified priority, and community engagement criteria must have greater weight in Lifeline project selection than the management capacity, cost-effectiveness, and project budget criteria. (See language we have proposed in Section 11 and Appendix 2.)