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**PLANNING AND PROGRAMMING COMMITTEE  
JANUARY 16, 2008**

**SUBJECT: COORDINATED PUBLIC TRANSIT-HUMAN SERVICES  
TRANSPORTATION PLAN FOR LOS ANGELES COUNTY  
AND SOLICITATION PROCESS FOR FEDERAL JOB ACCESS  
AND REVERSE COMMUTE AND NEW FREEDOM PROJECTS**

**ACTION: ADOPT COORDINATED PLAN FOR LOS ANGELES COUNTY  
AND APPROVE RELATED ACTIONS**

**RECOMMENDATION**

- A. Adopt the “Coordinated Public Transit-Human Services Transportation Plan for Los Angeles County” (see Summary in Attachment A) to comply with the federal Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU);
- B. Authorize the Chief Executive Officer to execute a Memorandum of Understanding (MOU) with Caltrans that will allow Los Angeles County Metropolitan Transportation Authority (LACMTA) and Caltrans to coordinate a Job Access and Reverse Commute (JARC) and New Freedom (NF) project selection process for areas below 200,000 in population; and
- C. Amend the FY08 Budget to add one Full Time Equivalent (FTE) for support needed to manage, administer and oversee federal JARC and NF funding from SAFETEA-LU.

**ISSUE**

LACMTA, as the Designated Recipient for federal JARC and NF funding for Los Angeles County, is responsible for conducting a competitive selection process for available funding and awarding grants to sub-recipients. LACMTA must also certify that the selection process employed has resulted in a fair and equitable distribution of funds and that the projects selected for funding were derived from a locally developed, coordinated public transit-human services transportation plan (“the Coordinated Plan”).

**POLICY IMPLICATIONS**

By adopting the Coordinated Plan as recommended, the Board will allow LACMTA to fulfill its responsibilities as the Designated Recipient of FTA Section 5316 (JARC) and Section 5317 (NF) funds for Los Angeles County. LACMTA will be able to certify that the projects to be selected for funding were derived from a locally developed and adopted Coordinated Plan.

## OPTIONS

The Board of Directors could choose not to adopt the Coordinated Plan as recommended. However, we do not recommend that course of action as LACMTA is the Designated Recipient for federal JARC and NF funds for Los Angeles County. As the Designated Recipient for those funds, LACMTA is required under FTA guidelines to file a Coordinated Plan with the Federal Transit Administration (FTA) before selecting projects and awarding funds to those projects.

## FINANCIAL IMPACT

The additional one FTE recommended will be funded annually for the next ten years or as long as the JARC and NF programs are being funded with the federal funds that were set aside for management and administration. The FTA's guidelines for the JARC and NF programs allow the Designated Recipient to use some of the funds available to manage and administer all aspects of the grant funds and oversee the implementation of the projects by sub-recipients to ensure federal compliance. A Project Management Plan is required to be prepared and submitted to the FTA to support the activities related to managing these programs, which will also support these expenses.

Of the funds that SAFETEA-LU has authorized, \$34 million in total funding is anticipated to become available for eligible projects, which includes \$7 million from FY06 and \$27 million for FY07-FY09. Approximately \$24 million will be available for the JARC program and \$10 million for the NF program for Los Angeles County. The \$7 million remaining in FY06 funds is scheduled to lapse by September 30, 2008, if they are not approved in a grant before the deadline.

## BACKGROUND

By resolution dated May 25, 2006, the Board of Directors authorized LACMTA to be the Designated Recipient of federal JARC and NF formula funds. The Board also authorized the Chief Executive Officer to select projects, program funding, and file and execute FTA grant applications, agreements, and contracts on behalf of LACMTA to fulfill its responsibilities as the Designated Recipient. LACMTA as the Designated Recipient is responsible for conducting a competitive selection process for available JARC and NF funding and awarding grants to sub-recipients. LACMTA must certify that the selection process resulted in a fair and equitable distribution of funds and that the projects selected for funding were derived from a locally developed, coordinated public transit-human services transportation plan (the Plan for Los Angeles County can be found at [www.metro.net/projects\\_plans/default.htm](http://www.metro.net/projects_plans/default.htm) and a Summary is provided in Attachment A to this report).

### The Coordinated Plan for Los Angeles County

Under the existing MOU between LACMTA and Access Services, Incorporated (ASI), ASI is responsible for updating its service inventory and Action Plan to comply with the California Social Services Transportation Improvement Act. Consequently, with our concurrence, ASI expanded the scope of the recently completed 2006-2007 Action Plan Update to comply with

the SAFETEA-LU requirements for developing a coordinated plan focused on the unmet transportation needs of elderly, disabled, and low-income individuals. Consistent with the FTA's program requirements, ASI developed the Action Plan, which we used as the basis for the included Coordinated Plan. The Plan was developed through a process that involved representatives of the public, and private and non-profit transportation and human services providers. We believe that the Los Angeles County Coordinated Plan has been developed according to FTA requirements, and that it identifies those needs that can be addressed with FTA Section 5310-Elderly Persons and Persons with Disabilities, Section 5316-JARC, and Section 5317-NF program funding. Staff will continue updating this plan and will come back to the Board for adoption of a revised version as appropriate.

### Competitive Process for Solicitation for Proposals

To help Designated Recipients meet the SAFETEA-LU requirements for the competitive solicitation of grant applications for the JARC and NF programs, the FTA provides some flexibility with the process itself. The competition may be held annually or at intervals up to three years, as determined by the Designated Recipient and based on local needs. Eligible applicants, under FTA guidelines, may include private non-profit organizations, state or local governments, and operators of public transportation services. LACMTA held the last solicitation for grant applications in February 2007. Only 21 applications were received under the JARC and NF programs, but the submittals represented a considerable increase from prior years.

Since the February 2007 solicitation, we have identified areas for improving participation and success. First, we will issue the Solicitation for Proposals to fund projects for up to three years, as opposed to annually. This will help us to program and obligate available and anticipated FTA Section 5316 and Section 5317 funds through FY09, and will help Los Angeles County avoid having any funds lapse as mentioned previously. Furthermore, this will help minimize the administrative process, maximize project implementation efforts and allow for other efficiencies. We expect to authorize project expenses annually, contingent upon federal funding appropriations. As shown in Attachment B, we have identified categories of projects that address gaps identified in the Coordinated Plan. We plan to conduct our next countywide Solicitation for Proposals in January 2008.

We believe that this new approach for the required competitive solicitation process would allow for a more regional and integrated funding strategy. Such a strategy can better address the gaps between current services and needs, as well as opportunities to improve efficiencies in service delivery, as identified in the Coordinated Plan. Attachment C identifies the process for solicitation, award, and administration of the projects selected for funding.

### NEXT STEPS

With Board adoption, we will file the Coordinated Plan and a Project Management Plan (Attachment C) with Caltrans, the Southern California Association of Governments (SCAG) and the FTA, as applicable. We will execute an MOU with Caltrans to coordinate a JARC and NF project selection process for areas below 200,000 in population. Finally, we will conduct a countywide Solicitation for Proposals as described herein. Upon receipt of the

proposals, an evaluation team will review them for eligibility and rank them based on the established criteria, which are consistent with the federal regulations. Recommendations for awards will require approval from LACMTA's Chief Executive Officer before the projects are included in the Los Angeles County Transportation Improvement Program. Staff will prepare and submit grant applications to the FTA for the final award of the funds.

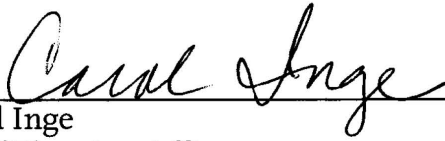
The following schedule reflects the anticipated activities as described herein:

- Requests for Proposals Released: January 2008
- Workshops: January & February 2008
- Proposals Due: March 2008
- Notify Board of Projects Recommended for Funding April 2008
- FTA Application Submitted: June 2008

### ATTACHMENTS

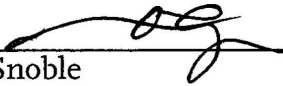
- A. Summary of Coordinated Plan for Los Angeles County
- B. Project Funding Categories
- C. Project Management Plan

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Programming and Policy Analysis



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Carol Inge  
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**Locally Developed, Coordinated  
Public Transit-Human Services Transportation Plan  
For Los Angeles County**

*Prepared By:*

Access Services, Inc. in Cooperation with  
Los Angeles County Metropolitan Transportation Authority

DECEMBER 2007

## **A Locally Developed, Coordinated Public Transit-Human Services Transportation Plan for Los Angeles County Executive Summary**

*This Plan establishes the construct for a unified comprehensive strategy for transportation service delivery in Los Angeles County that is focused on unmet transportation needs of elderly individuals, persons with disabilities and individuals of low income.*

### **THE COORDINATED PLAN: FEDERAL GUIDANCE REQUIRING THIS PLAN**

This plan is prepared in response to the coordinated planning requirements of SAFETEA-LU (Safe, Accountable, Flexible, Efficient Transportation Act – A Legacy for Users, P.L. 190-059), set forth in three sections of the Act: Section 5316-*Job Access and Reverse Commute*, Section 5317-*New Freedom Program* and Section 5310-*Elderly Individuals and Individuals with Disabilities Program*. The Los Angeles County Metropolitan Transportation Authority (Metro) is the designated recipient for Sections 5316 and 5317 funds and will be responsible for programming such funds in accordance to federal guidelines.

The coordinated plan establishes a comprehensive strategy for transportation service delivery in Los Angeles County focused on unmet transportation needs of elderly individuals, persons with disabilities and individuals of low income. The coordinated plan must contain the following four (4) required elements:

- An **assessment of available services** identifying current providers (public and private);
- An **assessment of transportation needs** for individuals with disabilities, older adults, and people with low incomes — this assessment can be based on the experiences and perceptions of the planning partners or on data collection efforts and gaps in service;
- Strategies and/or activities and/or projects** to address the identified gaps between current services and needs, as well as opportunities to improve efficiencies in service delivery;
- Priorities for implementation** based on resources (from multiple program sources), time, and feasibility for implementing specific strategies and/or activities identified.

Access Services Inc. initiated development of this coordinated transportation plan as Los Angeles County's designated consolidated transportation services agency (CTSA). The Los Angeles County Metropolitan Transportation Authority (Metro) is the designated recipient for the funds discussed in this plan and will be responsible for its implementation. It was logical that Access Services be responsible for the plan preparation given its ongoing responsibility for related plans of the Social Services Transportation Improvement Act of 1979, consistent with California Code Sections 15975 and 15951-15952 which require that transportation planning agencies and county transportation commissions to prepare and adopt a coordinated plan.

## APPROACH TO THE PLAN

The planning process involved quantitative analyses, including a demand estimation to gauge need and an inventory survey of countywide stakeholders to identify resources, needs and potential partners. Qualitative activities included public meetings and interviews with major agencies and organizations funding human services, with a representative group of direct service providers, and with representatives of the target group constituencies.

A critical element of the plan development approach was the ***Strategic Planning Committee***. This group was formed from an invitee list of almost fifty organizations, including transit operators, elected officials, Federal Transit Administration officials, neighboring county representatives, and human services organizations serving Los Angeles County constituencies.

## DEMAND ESTIMATION FINDINGS

A census-based estimate of demand was undertaken to identify the Los Angeles County target population and their potential trip demand. A range of 1.06 million to 1.77 million persons was estimated for the target population. These individuals are adults between the ages 16 to 64 who are low income or disabled and seniors age 65 and older. They represent between 11 percent and 19 percent of Los Angeles County's 2000 population of 9.5 million residents.

This proportion of the population was projected using general population estimates developed by the Southern California Association of Governments (SCAG) with other assumptions about changes in the senior population and the base adult population. These projections suggest that increasing proportions of Los Angeles County residents will be within the target populations, as follows:

- by 2010, up to 2.1 million persons or ***20 percent of the population***;
- by 2020, up to 2.4 million or ***21 percent of the population***; and
- by 2030, up to 2.7 million persons or ***22 percent of the population***.

Trip demand was estimated for the target population. Average trips per day were estimated, as well as, the proportion of public transit trips. Potentially ranges of 58 to 97 million trips were projected to be needed by adults who are low income or disabled and seniors. In addition, those trips requiring special assistance were estimated at 10 percent of the total trips, reflecting of range of 5.8 to 9.7 million trips, which are not now provided or not adequately provided.

This contrasts favorably with the 6.5 million documented trips provided by the public paratransit providers in Los Angeles County, suggesting that the levels of unmet need are not impossible to meet and are within the range of what is now provided. This plan examines the characteristics and nature of those specialized transit trips that are needed and not currently available.



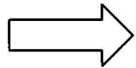
## STAKEHOLDER INVENTORY FINDINGS

A total of 208 inventory surveys were returned from an extensive, countywide stakeholder listing, reflecting a 5.4 percent response rate. Although below a typical response rate of 7 to 15 percent for such surveys, respondents were nonetheless representative of the type and breadth of agencies and organizations in Los Angeles County involved with transportation to the target populations.

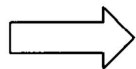
Inventory respondents were reasonably distributed among the five Metro sectors with the greatest number (31 percent) from the Westside/Central areas and the fewest from the South Bay (13 percent) and Gateway Cities (13 percent) respectively. Respondents' legal characteristics included: 48 percent private, non-profit agencies; 33 percent public agencies, 15 percent private for-profit agencies and four percent faith-based organizations. Key findings from the stakeholder survey included:



**Medical trips** ranked as the number one trip need by the human services organizations and **long-trips, beyond the local community**, ranked as the number one trip need by the public transit agencies. These are often the same type of trip, as medical trips generally require medium to longer distance travel, with medical destinations frequently outside jurisdictional boundaries and not served by locally oriented transportation providers.

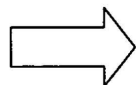


The **most frequently noted barrier** to coordination was the **"mixing" of clients** and consumers on transportation services. This issue is reported by agencies and organizations in other settings and presents challenges, especially in operating environments where vehicle resources are limited and where the profile of the client/customer base is varied, such as dialysis patients, adult day health care consumers and low-income children attending daycare. Another common barrier was **uncertainty about with whom to coordinate** where agencies indicated potential willingness to coordinate but no clarity as to with whom to do so.



Significant numbers of agencies indicated **interest in coordination**, while slightly over one-third of respondents indicated they were "not interested in coordination." Among the coordination topics with the largest supporting groups were:

- Coordinated trip scheduling and dispatch – 22 percent
- Contracting with other agencies to provide trips – 15 percent
- Coordinated vehicle/ capital purchases – 15 percent
- Pooling or sharing of vehicles – 13 percent
- Joint purchase of equipment, supplies, insurance – 13 percent
- Shared fueling, maintenance, storage facilities – 12 percent



Public transit operators, for the most part, have predictable and stable funding sources, which include Federal, State, and local sources. Human services organizations report high levels of dependency upon donations and fees, with limited on-going funding. Surveyed human services agencies reported that more than half of their transportation funding (53 percent) goes to bus pass and token purchases.

## STAKEHOLDER INVOLVEMENT PROCESS RESULTS

The stakeholder involvement effort included meetings and interviews with stakeholders, termed “appropriate planning partners” by the FTA. This included management and staff representatives of human services agencies and organizations, clients and consumers, public transit staff, and other governmental personnel. Key findings were characterized in terms of: 1) transportation needs; 2) barriers to coordination; and 3) suggestions for potential coordination projects. This process allowed considerable participation by stakeholders in the coordination “dialogue” and incorporation of significant stakeholder input into the plan.

## NEEDS ASSESSMENT, RESOURCES AND GAPS

The unique and individualized needs reported and expressed through the inventory and stakeholder involvement processes were significant. These were discussed in two dimensions. First, in relation to *consumer-oriented characteristics* of need, including those of frail and able-bodied seniors, persons with a variety of disability-types, and low income individuals, including families and homeless persons. Secondly, *organizationally-oriented characteristics* of need include the trip types needed, the importance of on-time performance, transit pass and bus token issues, expanded hours and days of service, information needs, and bus facility requirements of safe transfer locations and bus shelter amenities, including bathrooms. Gaps in service were characterized as follows:

***Institutional Communication Gaps*** exist, contributing to the difficulties of working between two very distinct service systems. For public transit, operating transportation services are its core business, around which significant infrastructure has been built. For human services agencies, transportation is a support service and often viewed as a distraction from agencies’ primary purposes.

***Service Capacity*** is an issue where certain trip needs of the target populations are not being met, despite a significant Los Angeles County network of public transportation.

***Meeting Individualized Needs*** remains a critical characteristic of the unmet specialized transportation need of this region. Providing service to those difficult-to-serve groups or difficult-to-meet trips are the challenges of this planning effort.

***Improving Performance of Demand Response Services*** is critical to consumers and their agency and organization representatives, issues related to service quality. These include addressing on-time performance, late pick-ups, late arrivals, too-long travel times and no-show vehicles. Reliability of paratransit services is an important issue where problems can translate into critical situations for frail, vulnerable and dependent populations.

***Improving Communication between Drivers, Dispatchers and Passengers*** is critical to improving the capability of services to address consumers’ mobility needs. This includes expanding transit’s ability to meet the diverse language needs of Los Angeles’ populations, evident particularly among frail elderly persons who do not speak English.

***Non-emergency Medical Trips and Inter-Community Medical Trips*** surfaced as the consistently difficult-to-meet trip type needed across all groups. This is exacerbated in California by state-level policy related to MediCal reimbursement and in Los Angeles particularly where medically-oriented trips are typically long trips to distant regional facilities.

## MEETING COORDINATION REQUIREMENTS AND TRANSLATING NEEDS INTO PROJECTS

The myriad of individualized needs emerging through discussions with agency representatives and with consumers helped develop project needs. Projects are discussed in relation to the ***type of consumer***, as with senior transportation, or the ***types of trips needed***, as with non-emergency medical transportation, or the ***types of transportation improvements*** necessary to effectively serve members of the target populations. Exhibit E-1 lists the gaps identified from stakeholders and provides examples of potential projects to meet those gaps.

Target Population	Special Transportation Needs and Concerns	Type of Transportation Modes	Potential Transit or Transportation Projects
<b>Seniors, Able-Bodied</b>	<ul style="list-style-type: none"> <li>- Lack of knowledge about resources.</li> <li>- Concern about safety and security</li> <li>- Awareness of time when driving might be limited.</li> </ul>	<ul style="list-style-type: none"> <li>- Fixed- route transit</li> <li>- Point deviation and deviated FR</li> <li>- Senior DAR</li> <li>- Special purpose shuttles: recreation, nutrition, shopping</li> </ul>	<ul style="list-style-type: none"> <li>- Educational initiatives, including experience with bus riding BEFORE it is needed.</li> <li>- Buddy programs and assistance in "trying" transit</li> <li>- Transit fairs, transit seniors-ride-free days</li> </ul>
<b>Seniors, Frail and Persons Chronically Ill</b>	<ul style="list-style-type: none"> <li>- Assistance to and through the door.</li> <li>- On-time performance and reliability critical to frail users.</li> <li>- Assistance in trip planning needed.</li> <li>- Need for shelters</li> <li>- Need for "hand-off" for terribly frail</li> </ul>	<ul style="list-style-type: none"> <li>- ADA Paratransit</li> <li>- Emergency and non-emergency medical transportation</li> <li>- Escort/ Companion Volunteer driven services</li> <li>- Special purpose shuttles</li> </ul>	<ul style="list-style-type: none"> <li>- Escorted transportation options</li> <li>- Door-through-door assistance; outside-the-vehicle assistance.</li> <li>- Increased role for volunteers.</li> <li>- Technology that provides feedback both to consumer and to dispatch; procedures to identify frailest users when traveling.</li> <li>- Individualized trip planning and trip scheduling assistance.</li> <li>- Mileage reimbursement programs.</li> <li>- Appropriately placed bus shelters.</li> </ul>
<b>Persons with Disabilities</b>	<ul style="list-style-type: none"> <li>- Service quality and reliability</li> <li>- Driver sensitivity and appropriate passenger handling procedure</li> <li>- Concerns about wheelchair pass-bys</li> <li>- Need for shelters</li> <li>- Sometimes door to and through door or issues of "hand-off"</li> </ul>	<ul style="list-style-type: none"> <li>- ADA Paratransit</li> <li>- Emergency and non-emergency medical transportation</li> <li>- Special purpose shuttles</li> <li>- Escort/ Companion Volunteer driven</li> </ul>	<ul style="list-style-type: none"> <li>- Continuing attention to service performance; importance of time sensitive service applications</li> <li>- Driver education and attention to procedures about stranded or pass-by passengers with disabilities.</li> <li>- Aggressive program of bus shelters</li> <li>- Information as universal design solution</li> </ul>
<b>Persons of Low Income and Homeless Persons</b>	<ul style="list-style-type: none"> <li>- Easy access to trip planning information</li> <li>- Fare subsidies (bus tokens or passes) that can be provided in a medium that is not cash</li> <li>- Availability of tokens or passes</li> <li>- Breaking down the culture of poverty that uses transportation as the difficulty for not moving about the community.</li> <li>- Difficulties of mothers with multiple children</li> <li>- Need to bring along shopping carts</li> </ul>	<ul style="list-style-type: none"> <li>- Fixed-route transit</li> <li>- Point deviation and deviated FR</li> <li>- Special purpose shuttles (work, training, Sp Ed.)</li> </ul>	<ul style="list-style-type: none"> <li>- Train the trainers, staff who can train consumers to access public transit.</li> <li>- Creative fare options available to human services agencies.</li> <li>- Increased quantity of bus tokens available.</li> <li>- Bus passes available to those searching for jobs or in job training programs; cost-effective.</li> <li>- Special shuttles oriented to this population's predictable travel patterns.</li> <li>- Education extensive about transit; continued work to improve transit service levels (coverage, frequency, span of hours)</li> </ul>
<b>Persons with Sensory Impairments</b>	<ul style="list-style-type: none"> <li>- Difficulty in accessing visual or auditory information.</li> <li>- Possible door-to-door for visually impaired</li> </ul>	Same as for frail seniors	<ul style="list-style-type: none"> <li>- Information in accessible formats</li> <li>- Guides (personal assistance) through information</li> <li>- Driver training critical to respond to needs.</li> </ul>
<b>Persons with Behavioral Disabilities</b>	<ul style="list-style-type: none"> <li>- Medications make individuals sun-sensitive and waiting in the sun is not an option.</li> <li>- Medications make for thirstiness; long hour waits in the heat can lead to dehydration.</li> <li>- Mental illnesses can make it frightening to be in the public spaces such as public bus stops.</li> <li>- Impaired judgment and memory makes for poor decision-</li> </ul>	<ul style="list-style-type: none"> <li>- ADA Paratransit</li> <li>- Emergency and non-emergency medical transportation</li> <li>- Special purpose shuttles</li> <li>- Escort/ Companion Volunteer</li> </ul>	<ul style="list-style-type: none"> <li>- Possibly special shuttles oriented to these known predictable travel needs.</li> <li>- Aggressive program of bus shelters</li> <li>- "Hand-off" can be critical to pass rider to a responsible party.</li> <li>- Important that driver understand riders' conditions.</li> </ul>

## **PRIORITIES FOR PROJECT SELECTION**

Meeting the specialized transportation needs of the three diverse and often overlapping segments of the population, seniors, persons with disabilities and low-income individuals is challenging. Actions and strategies developed will be incrementally effective in improving services, by providing a wider array of travel options to the target populations. This can be accomplished by gradually building the capacity of public transit and human service agencies/organizations to implement coordinated projects and programs. Both public transit and human service agencies/organizations must be active partners in this capacity building process.

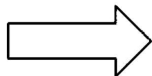
The actions necessary to increase the capacity of public transit to offer improved access and availability of transportation options for the target populations will differ from those actions and strategies needed to build capacity for human services transportation. Moreover, the need to build the capacity and reliability of human service transportation providers to complement public transportation services is critical, since the overall mission of these agencies/organizations is to serve individualized need, including operating services that public transportation cannot offer (e.g., non-emergency medical, door-through-door and escorted trips). For these reasons, project opportunities designed to strengthen the ability of human service agencies to continue to provide the hard-to-serve trip needs of seniors, persons with disabilities and low-income individuals should be encouraged.

Priorities relative to the development and funding of coordinated transportation projects identified through the locally developed comprehensive unified plan should:

1. Adequately address the unmet/underserved and individualizes transportation needs of the targeted populations;
2. Maintain consistency with current Federal and State funding regulations and requirements;
3. Be financially sustainable;
4. Include measurable goals and objectives, largely developed by the applicants;
5. Build and/or increase overall system capacity and service quality; and
6. Leverage and maximize existing transportation funding and capital resources, including human services funding.

## **PLAN VISION, GOALS AND RECOMMENDATIONS**

A vision is proposed for Los Angeles County's locally developed plan:



**IMPROVED COMMUNITY MOBILITY FOR LOS ANGELES COUNTY SENIORS,  
PERSONS WITH DISABILITIES AND PERSONS OF LOW INCOME**

To this end, we developed four (4) goals, supported by sixteen (16) implementing objectives to accomplish coordination in the county. In addition, a total of forty-two (42) implementing actions, strategies or projects are recommended. The goals, objectives, implementing actions or strategies and recommended projects are presented below and outlined in Chapter 8 of the full plan document, specifically in Table 8-2. The goals are responsive to the Federal guidance for the locally developed plan and establish the roadmap by which mobility needs of the Los Angeles County target populations can be addressed. The implementing strategies are the methods by which gaps in services and opportunities for

improved efficiencies may be effectuated, through various coordinated initiatives. The four goals and the potential projects suggested follow.

### **GOAL 1 - COORDINATION INFRASTRUCTURE**

Given the level and diversity of needs in the county, a regional approach to facilitating coordination is needed, as no one agency or organization has the resources to effectuate the necessary cultural, institutional and operational changes needed to accomplish coordination goals. Coordination in Los Angeles County cannot be accomplished without dedicated staff and financial resources. Projects funded under this goal should establish and/or further the development of a mobility manager concept, to be implemented at a regional level, sub-regionally and at agency levels. This includes:

<b>FUNDING CATEGORY: COORDINATION INFRASTRUCTURE</b>
<b>Projects submitted under this category should generally:</b> <ol style="list-style-type: none"><li>1. Establish a Regional Mobility Management capability to provide leadership on coordination of specialized transportation within Los Angeles County.</li><li>2. Conceptualize tools to support voluntary, agency-level mobility manager capabilities and recruit human services and public transit agency participation.</li><li>3. Develop visibility around specialized transportation issues and needs, encouraging high level political and agency leadership.</li></ol>

### **GOAL 2 – BUILDING CAPACITY**

Acknowledging that more transportation capacity is needed to meet the needs of a growing population within Los Angeles County, this goal proposes more trip options for the target populations. This goal inherently requires a strengthening of the ability of human service agencies to provide trips that public transit cannot, thereby increasing not only capacity but access to services. The notions of reliability, quality of service and service monitoring are reflected under this goal, important for both public transit and human service agency transportation providers. Projects and activities under this category could involve the following:

<b>FUNDING CATEGORY: BUILDING CAPACITY</b>
<b>Projects submitted under this category should generally:</b> <ol style="list-style-type: none"><li>1. Promote policies to increase the <u>quantity</u> of public transit and specialized transportation provided.</li><li>2. Improve the <u>quality</u> of public and specialized transportation, with attention to meeting individualized needs.</li><li>3. Improve transportation solutions between cities and between counties.</li><li>4. Make capital improvements to support safe, comfortable, efficient rides for the target populations.</li><li>5. Establish mechanisms to support transportation services provided by human services agencies.</li><li>6. Establishing procedures to measure the quantities of trips provided, existing and new.</li></ol>

### GOAL 3 – INFORMATION PORTALS

The need to broaden the reach of information related to transit and specialized transportation services for clients/consumers, as well as stakeholder agencies and organizations is critical. Los Angeles County has a wealth of transportation service resources. Points of access to transportation information must be expanded to make it easier for everyone to understand and use the transportation network. Activities proposed under this goal include:

<b>FUNDING CATEGORY: INFORMATION PORTALS</b>
<b>Projects submitted under this category should generally:</b> <ol style="list-style-type: none"><li>1. Integration and promotion of existing information strategies, including 211, web-based tools and Access Services RideInfo to help get public transit and specialized transportation information to consumers.</li><li>2. Development of information portal tools for wide distribution of existing information.</li><li>3. Promoting opportunities to disseminate transportation information for human services agency line staff and workers.</li></ol>

### GOAL 4 – COORDINATION POLICIES

There is a need to effectuate changes to governmental policies and practice that may discourage coordination – at local, regional, state and federal levels for the purpose of realizing coordination goals between the two systems. For example, there is a continuing effort to challenge and potentially change Medi-Cal reimbursement policies at the state level. Other policies will need to be identified and addressed over time, in part through measurement of the success, failure and impacts of implemented projects. Activities developed under this goal may include:

<b>FUNDING CATEGORY: COORDINATION POLICIES</b>
<b>Projects submitted under this category should generally:</b> <ol style="list-style-type: none"><li>1. Work to establish non-emergency medical transportation policies to more cost-effectively meet medically-related trip needs.</li><li>2. Establish processes by which implemented projects are evaluated against goals set by applicant agencies.</li><li>3. Report on project successes and impacts at direct service levels, sub-regional levels and countywide levels and promote project success at state and federal levels.</li><li>4. Review policies related to transportation of target population members between counties where the policies are a deterrent to transporting individuals to medical facilities within a reasonable distance of county borders.</li></ol>

### SEQUENCING AND PRIORITIZATION OF RECOMMENDATIONS

Public transit and human service agencies/organizations providing specialized transportation service in Los Angeles County are documented in this plan as extensive and substantially funded. This plan proposes the enhancement and improvement of the existing network of services through coordination – specifically for seniors, persons with disabilities and persons of low income. A coordination vision is proposed of improved mobility for the target populations.

To accomplish this vision, several dozen implementing actions and strategies have been detailed in the body of the report with the expectation that there will be incremental implementation and refinement of actions and strategies over the next few years. The

strategies outlined should be viewed as guidance for public transit and human service agencies, as actual projects developed by stakeholders will be based upon their specific needs, resources and ability and willingness to work to establish coordination relationships with others.

Activities for an initial phase are recommended as follows.

## **ESTABLISHING COORDINATION INFRASTRUCTURE (GOAL 1)**

### Los Angeles County Regional Mobility Manager

The establishment and implementation of the regional mobility manager (RMM) function and gradual development of sub-regional mobility managers in at least 5 subregions in the county are the fundamental recommendations of the Plan. It is recommended that a regional mobility manager, including the governance body or technical advisory body discussed in the detail in Chapter 8, be put into place within one to two years.

As discussed previously, RMM roles and responsibilities can either be designated to an existing agency/organization, or a newly created entity can be formed. The RMM should further the goals outlined in the plan, and continue efforts to establish relationships between public transit and human service agencies, including technical assistance and cooperation with subregional mobility managers to develop coordinated transportation plans, programs and projects.

### Subregional Mobility Managers

It has been demonstrated that although regional responses to planning can be effective in establishing the infrastructure needed to effectuate coordinated actions, knowledge of the transportation needs at the subregional level is important to support the regional goals and more adequately address individual needs.

Conceivably, a subregional mobility manager could be a public transit agency or organization, a human service agency/organization or a representative partnership of both agency/organization types within the same subregion. A total of five subregional mobility managers are envisioned consistent with the Metro service sector boundaries. There will likely be a developmental process to gradually increase the scope of these subregional entities to build and maintain viable partnerships. These entities would work cooperatively with and support the RMM in the development of plans and projects within their subregion, as well as, participate as members of the RMM advisory body.

### Priority Phase 1 Strategies and Concepts

There are a few “basic” strategies and project concepts that if developed early, will work to support and promote the framework of a coordinated transportation environment as it matures. These can be funded in the near-term (i.e. 1-2 years). It is recommended that the RMM and/or other public transit and human services agencies/organizations explore the feasibility of implementing these strategies/project concepts at the regional and subregional levels. Strategies and project concepts to be immediately implemented can include:

- **IMPLEMENTATION OF A TRAVEL TRAINING PROGRAM FOR AGENCIES/ORGANIZATION STAFF AND THEIR CLIENTS.** A county-wide Travel Training program can become a focus of information exchange between agencies. A county-wide program will encourage greater utilization of transit for those in the targeted populations who can



and would use public transportation. Agency staff desiring to arrange transportation or refer their clients to transit, as well as, new and prospective clients and customers needing to travel to their various destinations would be candidates for training, participating in group training for both fixed-route and paratransit.

- **PUBLIC TRANSIT SHOULD DEVELOP A DATA COLLECTION PROCESS DESIGNED TO ASSIST HUMAN SERVICE AGENCIES AND ORGANIZATIONS.** Human service agencies operating transportation and their contractors must establish reliable trip counting procedures to ensure accuracy and consistency in accounting for senior, persons with disabilities and low-income persons' trips provided in the county. At a minimum human service agencies should be collecting data in the following categories:
  - One-way passenger boardings
  - Passenger pick-up and drop-off points by zip code
  - Passenger pick-up and drop-off points by street address
  - Passenger trip purpose
  - Time of day

The design of data collection methodologies should reflect an understanding of the issues of collecting and reporting certain categories of client information relative to the Health Insurance Portability and Accountability Act (HIPAA) and the Lanterman Developmental Disabilities Act as these relate to client confidentiality.

Improved trip counting and reporting will provide information on the level of services operated in the county, and help to identify patterns of travel. This will also encourage participation of human service agencies as partners with public transit in the planning and development of coordinated services. Moreover, data collection efforts should also be used to gain the necessary financial support and resources from Federal and State agencies and as a means to more clearly identify client and consumer needs in the county.

- **PROMOTE COORDINATED SERVICE DELIVERY MODELS THAT EMPLOY THE USE OF VOLUNTEER LABOR.** Focused in structured, defined geographic settings, the use of volunteers has been demonstrated to be highly successful in helping to meet the individualized mobility needs this plan identifies.
- **CONDUCT AN ANNUAL INVENTORY PROCESS TO CONTINUE TO BUILD AND NURTURE THE COORDINATION ENVIRONMENT.** This activity will serve to ensure that the data and information on transportation services, resources and needs is updated, which will provide a relatively sound basis for ongoing, coordinated planning activities.
- **DEVELOP ADDITIONAL PROCESSES TO FACILITATE BUS PASS PURCHASE PROGRAMS ON BEHALF OF CONSUMERS.** Many human services dollars go to purchase of bus passes and tokens but numerous problems exist around procuring these for agencies and their consumers.

The complete Plan is available on-line at [www.metro.net/projects\\_plans/default.htm](http://www.metro.net/projects_plans/default.htm).

## **JARC AND NEW FREEDOM PROGRAMS PROJECT FUNDING CATEGORIES**

Consistent with the goals of the JARC and New Freedom programs, and the needs identified in the Coordinated Plan, proposals will be solicited in the following areas, as shown in greater detail under the funding categories listed in the Plan:

### ***Regional Coordination of Infrastructure***

- Establish a Regional Mobility Management capability within Los Angeles County (or a portion of it) to coordinate specialized transportation services.
- Develop organizational capabilities for recruiting and training volunteers within the various social service agencies to coordinate the provision of transportation.
- Develop joint training activities to bring together transit providers and human services personnel to identify coordinated/mutually supportive operations.
- Develop projects to illustrate how coordination can improve the quality and quantity of non-emergency transportation services in a more cost-effective manner.

### ***Building Capacity***

- Develop coordination projects with entities outside the applicant's immediate service area, where longer trips are needed to access major medical and related facilities.
- Add capacity to existing services or expand service hours to provide needed late evening or weekend service.
- Train volunteer drivers and establish mileage reimbursement programs for them.
- Provide transit shelters and layover facilities at transfer points.
- Establish transportation subsidy/voucher programs using modern technology.
- Develop shuttle services to help access public transit systems where appropriate.
- Develop door-through-door service options for needy clients.

**JARC AND NEW FREEDOM PROGRAMS  
PROJECT FUNDING CATEGORIES**

***Information Portals***

- Develop web-based information systems to assist users in identifying and selecting eligible transportation services, and the eligibility requirements, costs and schedules for such services
- Related to the above, develop computerized information and training systems available to social service agency employees, to help them arrange for the most cost-effective social service transportation options.
- Develop distribution systems to provide updated transportation information to social service agencies.

***Mobility Management and Coordination***

- Develop a pilot brokerage program in a limited geographic sector, to demonstrate the viability of a single entity to screen, qualify, and assign social service agency clients to the most cost-effective transportation options.
- Establish a reporting and evaluation program to assess the effectiveness of implementing such brokerage programs on a wider scale.

## Los Angeles County Metropolitan Transportation Authority (Metro)

### Program Management Plan JARC and New Freedom Programs

#### Goals and Objectives

The goal of this Program Management Plan (PMP) is to describe the Los Angeles Metro's process for managing the federally funded Job Access and Reverse Commute (JARC) and New Freedom (NF) programs within Los Angeles County. As part of this process, Metro intends to fulfill the following objectives:

- Establish and conduct an open competitive process for soliciting and evaluating JARC and NF funding proposals;
- Assure that proposals selected for funding are responsive to one or more of the needs identified in the L.A. County Coordinated Human Services Transportation Plan;
- Establish the requirements for the selected projects to enter into grant agreements with Metro;
- Summarize the requirements for managing and reporting the progress for implementing the funded projects.

#### Roles and Responsibilities

Metro is unique among the nation's transportation agencies as it serves as transportation planner and coordinator, designer, builder and operator for one of the country's largest, most populous counties. More than 9.6 million people – nearly one-third of California's residents – live, work, and recreate within its 1,433-square-mile service area.

Metro, as the Regional Transportation Planning Agency, is responsible for the Long Range Transportation Plan for Los Angeles County. The Metro Planning Department programs and administers funds for a wide array of transportation projects including bikeways and pedestrian facilities, local roads and highway improvements, and goods movement. Metro, serving as the pass-through agency, manages and administers Federal Transit Administration (FTA) programs on behalf of sub-grantees. Metro has been administering these federal programs since 2001.

Metro is the designated recipient for JARC and NF funds allocated to Los Angeles County. Metro's role includes the administration, management, and programming of these funds and overseeing the implementation of the projects. Also, Metro serves as the pass-through agency for the sub-grantees receiving federal awards under these programs. Metro's responsibilities as the designated recipient of JARC and NF funds are described below.

## Los Angeles County Metropolitan Transportation Authority (Metro)

### Program Management Plan JARC and New Freedom Programs

#### Administration

Metro assigned a dedicated Program Manager to serve as the administrator of the FTA's JARC and NF programs. The Program Manager reports to the Director of Regional Program Management, and she/he is responsible for managing and administering all the grants, contracts, funding agreements for all Metro departments as well as other project sponsors (Sub-grantees) receiving FTA funds.

The following summarizes the responsibilities of the JARC and NF Program Manager position.

- Assists sub-grantees meeting financial requirements and providing technical support regarding eligibility and uses of federal funds.
- Ensures that sub-grantees adhere to the FTA Master Agreement, Metro's pass-through agreement, and other federal and state requirements as applicable to ensure federal funds are used according to the established contractual requirements. This activity is accomplished with site visits, and review of sub-grantees' records.
- Seeks from the sub-grantees an annual signed certification that affirms sub-grantees' compliance with the standard terms and conditions governing the administration of projects funded with federal dollars awarded by the FTA through Metro as described on the MOU or FTA Master Agreement. This information is provided to the auditors as part of our compliance monitoring effort.
- Annually, the Program Manager will prepare a cash flow plan of JARC and NF related expenditures to be included in the annual budget for the fiscal year that starts in July 1.
- The Program Manager is responsible for providing the program of projects funded with JARC and NF funds to SCAG for inclusion in the Federal Transportation Improvement Program.
- Upon approval of the federal budget for the federal fiscal year that starts October 1 and upon approval of the federal transportation appropriation sometime thereafter and publication in the Federal Register, the Program Manager will prepare a summary of the funds available for distribution for the Los Angeles and

## Los Angeles County Metropolitan Transportation Authority (Metro)

### Program Management Plan JARC and New Freedom Programs

Lancaster Urban Areas. The information will be distributed to the counties of San Bernardino, Riverside, and Orange and to the MPO, the Southern California Association of Governments, for their records. This information will also be made available at Metro's web-site under [www.Metro.net/projects\\_plan/default.htm](http://www.Metro.net/projects_plan/default.htm).

- Initiates the development of the grant applications to the FTA and upon FTA award will initiate the funding agreements with the sub-grantees.
- Provides project management assistance to the sub-grantees or potential sub-grantees regarding the application, administration, and compliance requirements of the JARC and NF programs. This includes assisting with the procurement process and matching requirements.
- Coordinates regular workshops or meetings with the various agencies that provide specialized transportation services or related information to ensure agencies have the technical capabilities to assist their customers with transportation needs and to manage their projects.
- The Program Manager is responsible for managing updates to the Coordinated Plan and encouraging participation from public, private, and not-for profit agencies that provide transportation-related services to the senior, disabled, or low-income populations.
- To monitor and report the benefits of the federal investment, the Program Manager shall assist the sponsor agencies with development of performance measures for each JARC and NF funded project. This information will be made available to the public for review. Accordingly, this information should be used as a tool to revise the coordinated plan as required.
- Represents Metro at meetings with the State DOT, the Southern California Association of Governments and the FTA. The Program Manager is responsible for maintaining a working relationship and coordination with the state and federal agencies and the MPO regarding human services transportation programs funded with the JARC and NF funds.
- Make recommendations to the Board for improvements in managing and administering these programs.
- The Program Manager is the point of contact for any JARC and NF related activities. Also, the Program Manager serves as the coordinator of reviews and

## Los Angeles County Metropolitan Transportation Authority (Metro)

### Program Management Plan JARC and New Freedom Programs

audits performed by the FTA, State DOT, SCAG, and the General Accountability Office (GAO) as it relates to these federal programs.

#### Management

The following describes the activities to be performed by the Program Manager to ensure federal funds are not lost to the region. The activities described below are part of the oversight and project management activities necessary to ensure that projects funded with JARC and NF funds are implemented in accordance to the FTA program guidelines and funding agreements.

- Work with the Office of Management and Budget (OMB), Accounting, and Planning to include project-related information in Metro's Financial Information System, such as project identification number, grant number, encumbrance amount, and funding sources. This information is needed for accounting and monitoring of project funding and expenses.
- Review for accuracy and eligibility sub-grantee invoices, approve payments on-line, and ensure payments are made as approved and that the required documentation is filed by both accounting and planning. Work with the sub-grantee to resolve any potential ineligibility issues.
- Monitor expenses and reimbursement to sub-grantees to ensure compliance with the federal award.
- Prepare quarterly status progress reports and financial reports and report to the FTA TEAM system prior to the deadline.
- Monitor, through site visits, project implementation activities and ensure compliance with federal and contractual requirements.
- Analyze project activities and determine if any changes to the budget, scope, or schedule are required; initiate any needed changes and obtain proper local approvals prior to requesting FTA's approval to grant revisions.
- Analyze monthly or quarterly project expenses and reimbursements from the FTA and reconcile with FTA's TEAM system for accuracy. Work with accounting to investigate and resolve any discrepancies.
- Prepare and file grant amendments as needed.
- Prepare and file grant budget revisions.
- Prepare and file grant closeouts.

#### Updates to Coordinated Plan

Under an annual Memorandum of Understanding (MOU), Metro provides funding support for Access Services, Inc. (ASI), the designated CTSA for Los Angeles County since 1994, as provided under California law. ASI is responsible for the

## Los Angeles County Metropolitan Transportation Authority (Metro)

### Program Management Plan JARC and New Freedom Programs

administration of Access Paratransit, the ADA mandated transportation program for Los Angeles County serving the mobility needs of persons with disabilities.

As part of its responsibilities under its MOU with Metro, ASI updates its service inventory and Action Plan, in compliance with the California Social Services Transportation Improvement Act. The scope of the recently completed 2006-2007 Action Plan update was expanded, in order to comply with the SAFETEA-LU requirements for developing a coordinated plan focused on the unmet transportation needs of elderly, disabled, and low-income individuals. The Coordinated Plan has four required elements:

- An assessment of available transportation service providers, both private and public
- An assessment of the transportation needs of disadvantaged individuals who may be elderly, disabled, and/or low-income
- A listing of strategies to address these transportation needs and the identification of gaps in service
- A priority listing of projects to be implemented based on available resources and feasibility for implementing specific strategies identified

The SAFETEA-LU Coordinated Plan for Los Angeles County was completed in November 2007 and it is available at [www.metro.net/projects\\_plans/default.htm](http://www.metro.net/projects_plans/default.htm)

#### Title VI Compliance

FTA requires grantees to document that they distribute FTA funds without regard to race, color, and national origin. Metro's distribution of the JARC and NF funds is consistent with Metro's Title VI policy which is made part of this document by reference. The Policy can be found at [http://www.metro.net/about\\_us/title\\_vi/default.htm](http://www.metro.net/about_us/title_vi/default.htm).

#### Coordination

As detailed in the Coordinated Plan, a Strategic Planning Committee was established early in the plan's development process. Invited participants included representatives from major public transportation agencies, cities, human services organizations, County Board of Supervisors, and adjacent county representatives from similar entities. The following agencies, as well as ASI staff, participated:

- Los Angeles, Department of Social Services
- East Los Angeles, Regional Center



## Los Angeles County Metropolitan Transportation Authority (Metro)

### Program Management Plan JARC and New Freedom Programs

- Developmental Disabilities Area Board X
- Los Angeles Homeless Services Authority
- Los Angeles City commission on Disability
- Pomona Valley Transportation Authority
- Los Angeles County Metropolitan Transportation Authority (Metro)
- Southern California Association of Governments
- ITN Santa Monica

In addition, presentations were made to the Los Angeles County Bus Operators Subcommittee and copies of the draft Plan were mailed to their members for comments.

#### Eligible Subrecipients

Under the FTA JARC and NF program guidelines, the following entities are eligible to apply for projects within Los Angeles County:

- Local governmental agencies
- Public and private transportation providers
- Social service agencies
- Tribal governments
- Non-profit organizations

To be eligible for funding, proposed projects must either have an origin or a destination within the Los Angeles County. Projects that service the Santa Clarita area may submit an application to Caltrans and compete statewide for the portion of the JARC and NF funds made available to California for areas below 200,000 in population.

#### Local Share and Local Funding Requirements

Both JARC and NF funding can be used for planning, capital, or operating costs of services to improve the mobility of the targeted populations. In the case of JARC funds, they are for the purpose of providing access to jobs for persons of limited means, or reverse-commute service for all potential passengers. The focus of New Freedom funds is to support new public transportation services beyond those required by the ADA and also new public transportation alternatives beyond those required under ADA. Under the NF program, “new” service is defined as service that was not operation prior to August 10, 2005 and did not have an identified funding source as of that same date.

## Los Angeles County Metropolitan Transportation Authority (Metro)

### Program Management Plan JARC and New Freedom Programs

Both JARC and NF funds are eligible to support up to 80% of the cost of capital and mobility management projects (80/20 match), and up to 50% of the net operating costs (50/50 match). Please note grant funds may not be used for the purchase of transit fares or monthly/multi-ride passes; however, the cost of administering transportation voucher programs is an eligible capital expense.

Non-DOT federal funds, state, local and private funding or contributions can be used for matching purposes. Coordination with other federal programs that may provide support for transportation, such as health and human service programs, are encouraged. The following are examples of potential sources for matching funds:

- State or local funds, such as Prop C local return funds
- Non-DOT federal program funds available to support client transportation
- Revenues from contracts with human service agencies
- Income generated from advertising and concessions
- Donations and supportable in-kind contributions
- Volunteer driver programs

#### Project Selection Criteria and Methods of Distributing Funds

##### 1. Application Cycle

Given that JARC and NF funds have been authorized under SAFETEA-LU through FY 2009, we will consider project applications for a funding period of up-to 3 years. Funds remaining from FY 2007 will be combined with the funds expected to be made available by Congress for FY 2008 and 2009. This approach will permit the development of more viable and longer-term projects, reduce the administrative cost of the programs, and allow for other efficiencies.

Including the \$7 million remaining from FY 2007, funding over the 3-year authorization period is projected to total \$34 million, with the JARC program accounting for some \$24 million and the remaining \$10 million available under New Freedom.

We intend to authorize project expenses annually, contingent upon the levels of federal appropriations expected to be made available by the Congress each fiscal year.

##### 2. Selection Criteria

Los Angeles County Metropolitan Transportation Authority (Metro)

Program Management Plan  
JARC and New Freedom Programs

Consistent with the goals of the JARC and New Freedom programs, the FTA program guidelines, and the needs identified in the Coordinated Plan, proposals will be solicited in the following areas, as shown in greater detail under the funding categories listed in the Plan:

*a) Regional Coordination of Infrastructure*

- Establish a Regional Mobility Management capability within Los Angeles County (or a portion of it) to coordinate specialized transportation services.
- Develop organizational capabilities for recruiting and training volunteers within the various social service agencies to coordinate the provision of transportation.
- Develop joint training activities to bring together transit providers and humans services personnel to identify coordinated/mutually supportive operations.
- Projects to illustrate how coordination can improve the quality and quantity of non-emergency transportation services in a more cost-effective manner.

*b) Building Capacity*

- Coordination projects with entities outside the applicant's immediate service area, where such longer trips are needed to access major medical and related facilities.
- Add capacity to existing services or expand service hours to provide needed late evening or weekend service.
- Train volunteer drivers and establish mileage reimbursement programs for them.
- Provide transit shelters and layover facilities at transfer points.
- Establish transportation subsidy/voucher programs using modern technology.
- Develop shuttle services to help access public transit systems where appropriate.
- Develop door-through-door service options for needy clients.

*c) Information Portals*

- Develop web-based information systems to assist users in identifying and selecting eligible transportation services, and the eligibility requirements, costs and schedules for such services

## Los Angeles County Metropolitan Transportation Authority (Metro)

### Program Management Plan JARC and New Freedom Programs

- Related to the above, develop computerized information and training systems available to social service agency employees, to help them arrange for the most cost-effective social service transportation options.
- Develop distribution systems to provide updated transportation information to social service agencies.

#### *d) Mobility Management and Coordination*

- Develop a pilot brokerage program in a limited geographic sector, to demonstrate the viability of a single entity to screen, qualify, and assign social service agency clients to the most cost-effective transportation options.
- Demonstrate coordination among adjacent jurisdictions, to facilitate access to facilities for clients needing services outside their immediate local service area.
- Establish a reporting and evaluation program to assess the effectiveness of implementing such brokerage programs on a wider scale.

### 3. Proposal Evaluation and Scoring

A panel comprised of representatives from Metro, transit operators, citizen advisory groups, and social service agencies will evaluate the proposals based on established criteria.

The following will be the principal factors that will be used in evaluating individual proposals:

- Degree to which proposal meets the JARC/NF program goals and is responsive to the needs identified in the Coordinated Plan, the related selection criteria, and the FTA requirements. This first screening will result in only eligible applications moving forward with the ranking process.
- Completeness and viability of the proposal's financial plan and implementation schedule.
- Evidence of coordination with other agencies needing or providing transportation services (e.g., vehicle sharing, purchase of services, joint dispatch, etc.)
- Projects meeting critical needs in a cost effective manner in areas that currently lack or have only minimal transportation services.
- Proposals to increase operating efficiencies enabling the projects to provide expanded services with fixed or limited funding support.
- Long term viability or sustainability of the project beyond the grant funding period.

## Los Angeles County Metropolitan Transportation Authority (Metro)

### Program Management Plan JARC and New Freedom Programs

#### 4. Equity of Distribution

Beyond the broad outreach and consultation process undertaken during the development of the Coordinated Plan and the representation of the various provider and user groups on the evaluation panel, the Call for Projects will be widely publicized and disseminated directly to the agencies providing or needing specialized transportation services in L.A. County. The information is also disseminated through the Bus Operators Subcommittee at its monthly meetings with Metro and workshops.

As part of the application process, Metro will provide technical assistance to social service agencies that may not be experienced in the preparation of transportation project proposals. In addition, a joint application workshop will be held with Caltrans to ensure everyone has equal access to program information and submission requirements.

#### 5. Project Approval and Award

Proposals meeting eligibility requirements will be scored and ranked by the multi-agency evaluation panel as detailed above. Metro staff will submit the list of recommended projects to the CEO prior to submitting them to FTA for funding approval. The Board has delegated to Metro's CEO the authority to select and submit to the FTA the projects identified for federal funding.

Prior to submitting an application to the FTA, we will notify the Board of the list of projects recommended for federal funding.

#### 6. Award Notification

Award notifications will be posted in the Metro web-site. Project sponsors who received approval for funding will be sent an award notification letter. Following a funding agreement between Metro and the project sponsor or sub-grantee will be sent to the project sponsors for execution. Upon approval of the federal grant by the FTA, sponsors will be notified in writing of the start date of project implementation.

Metro will coordinate a sub-grantee orientation workshop to educate them on the process for implementation and the federal requirements that would have to be met to receive the funds.

# DRAFT

Attachment C

Los Angeles County Metropolitan Transportation Authority (Metro)

Program Management Plan  
JARC and New Freedom Programs

## 7. Sub-grantees Monitoring

Metro will schedule regular meetings with the sub-grantees to discuss issues or concerns regarding their projects and to provide assistance during implementation to ensure projects are consistent with the funding agreement. Sub-grantees will be required to provide supporting documentation when invoicing Metro for expenses incurred. Projects sponsors will not be paid in advance of costs incurred; instead these programs funds will be paid to the sub-grantee on a reimbursement basis only. Sub-grantees will be made aware of these requirements through the workshops and web-site information prior to them submitting an application.

Metro will take corrective actions to resolve any non-compliance issues and the sub-grantees will be informed if they are at risk of losing their funds awarded.