Putting Transit Funding to Work & Alternatives to Transit Grant Funding

National Tribal Symposium to Advance Transportation
May 15, 2019
Transit Funding Innovations

- Survey of 95 tribes about transit services
- 48 Tribal interviews & 14 site visits
- Booklet and PowerPoint:
  * Native Americans on the Move
    - Available from National RTAP
- Guidebook for tribal planners
  - Planning considerations
  - Needs assessment
  - Service planning
  - Funding sources and approaches
  - Implementation
  - Sustainability
  - Case studies
- Available at: [http://www.trb.org/Main/Blurbs/166797.aspx](http://www.trb.org/Main/Blurbs/166797.aspx)
## Potential Transit Program Funding Sources

<table>
<thead>
<tr>
<th>Page #</th>
<th>Funding Type</th>
<th>Eligible Activity</th>
<th>Service Population</th>
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<tbody>
<tr>
<td></td>
<td>Grant</td>
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<td>Apportionment</td>
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<td><strong>US Department of Transportation</strong></td>
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<td>195</td>
<td><strong>Federal Transit Administration (FTA)</strong></td>
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<td>b</td>
<td>Job Access and Reverse Commute Formula Program (5316)</td>
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<td>c</td>
<td>New Freedom Program (5317)</td>
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<td>d</td>
<td>Over the Road Bus Program</td>
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<td>Public Transportation – Tribal Transit Program [5311(c)]</td>
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<td>f</td>
<td>Rural and Small Urban Areas Program (5311)</td>
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<td>g</td>
<td>Transportation For Elderly and Persons with Disabilities Program (5310)</td>
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<td>Paul S. Sarbanes Transit in Parks Program (5320)</td>
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<td>Livable Communities Initiative</td>
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<td>Park Roads and Parkways Program</td>
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<td><strong>Other Federal Programs</strong></td>
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<td>a</td>
<td><strong>US Department of Agriculture</strong></td>
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<td>206</td>
<td>Rural Passenger Transportation Technical Assistance Program</td>
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<td>Community Development Transportation Lending Services, Inc. (CDTLS)</td>
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<td><strong>US Department of Commerce</strong></td>
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<td>209</td>
<td>Economic Development Administration (EDA) Grants</td>
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<td>c</td>
<td><strong>US Department of Education</strong></td>
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<td>210</td>
<td>Vocational Rehab Services for American Indians with Disabilities</td>
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<td>d</td>
<td><strong>US Department of Housing and Urban Development</strong></td>
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<td>210</td>
<td>Indian Housing Block Grants</td>
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<tr>
<td>e</td>
<td><strong>US Department of Health and Human Services</strong></td>
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<td>211</td>
<td>Community Services Block Grant Program</td>
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<td>212</td>
<td>Head Start Program</td>
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<td>213</td>
<td>Medicaid Program</td>
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<td>214</td>
<td>Programs for American Indian, Alaska Native and Native Hawaiian Elders</td>
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<td>215</td>
<td>Rural Health Outreach Grant Program</td>
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<td>216</td>
<td>Social and Economic Development Strategies (SEDS) Program/ Administration for Native Americans (ANA)</td>
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<td>217</td>
<td>Special Programs for the Aging-Title III, Part B: Grants for Supportive Services and Senior Centers</td>
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<td>Special Programs for the Aging-Title III, Part C: Grants for Nutrition Services</td>
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<td>Tribal Self-Governance – Indian Health Services Program</td>
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<td>220</td>
<td>Tribal Temporary Assistance for Needy Families Program</td>
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<td><strong>US Department of Labor</strong></td>
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<td>221</td>
<td>The Senior Community Service Employment Program</td>
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<tr>
<td>222</td>
<td>Workforce Investment Act Programs</td>
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</tr>
</tbody>
</table>

**Grant** = A federal financial assistance award making payment in cash or in kind for a specified purpose. **F** = Formula-based (usually to states); **C** = competitive/discretionary; **M** = mixed. **Allocation** = An administrative distribution of funds for programs that do not have a statutory distribution formula. **Apportionment** = The distribution of funds as prescribed by a statutory formula.
Key Funding Sources

- Tribal General Fund
- Capital Improvements Plan (CIP)
- Regional Transportation Planning (MPOs)
- Local, State and Regional Departments
- Public Health Departments
Key Funding Sources

- Civic organizations
- Hospitals
- Health care industry
- Private businesses
- Special interests
- Foundations/non-profits
Funding & Implementation Categories

- Mobility
- Safety
- Air Quality
- Environment
- Health
- Social Equity
- Recreation/Sports
- Economic Development
- Arts, Culture & History
- Education
Transit Funding Innovations

- **Internal Sources:**
  - General Fund or business enterprise allocations by the tribe
  - May serve as local grant match **or**
  - May attract funds from other sources.

- **Partnership Sources:**
  - Contributed by *local, regional, county, or state stakeholders* interested in tribal transit operation success.

- **Grant Matching Sources:**
  - Funds drawn from one grant source to match or supplement - *where permissible* - funds from another grant source.
Internal Sources

Quicksilver Coffee Shop
Days/Hours:
Monday - Thursday 6 AM to 8:30 PM
Friday - Sunday 7 AM to 8:30 PM
DAILY SPECIALS

Flathead Transit
Missoula · Pablo · Kalispell · Whitefish
For Information Call Flathead Transit
406-675-2700, extension 1352
Direct Line: 406-275-2877

Read Down
7 days/Week
10:00 AM
11:30 AM
11:50 AM
12:00 PM
Flag Stop
12:15 PM
1:00 PM
1:25 PM
2:10 PM
2:30 PM
3:10 PM
Pablo
Missoula
Evaro
Arlee
Ravalli
Saint Ignatius
Pablo
Polson
Lakeside
Kalispell/Evergreen
Whitefish
52001 US Hwy 93, Pablo MT 59855 406-275-2877
1660 West Broadway Street, Missoula, MT 59808 406-549-2339
20750 US Hwy 93, Missoula, MT 59808 406-726-1778
92345 US Hwy 93, Arlee, MT 59821 406-726-7777
27330 US Hwy 93, Ravalli, MT 59863 406-396-6522
240 Mountain View Drive, St. Ignatius, MT 59865 406-745-3634
52001 US Hwy 93, Pablo MT 59855 406-275-2877
49708 US Hwy 93, Polson, MT 59860 406-683-3636
7170 US Hwy 93, Lakeside, MT 59922 406-844-3372
2079 US Hwy 2 W, Evergreen, MT 59914 406-755-7447
500 Depot Street, Whitefish, MT 59937 1-800-872-7245

Read Up
7 days/Week
7:30 PM
7:05 PM
6:50 PM
Flag Stop
6:30 PM
6:00 PM
5:30 PM
4:55 PM
4:30 PM
4:00 PM

2019 National Tribal Symposium to Advance Transportation Conference
Internal Sources
Partnership Sources
GZGTS Waste Oil Heating System - FREE Fuel!
GZGTS Development Challenges
Solved with Innovative Solutions
Partnership Sources
Partnership Sources
Potential Partners

- MPOs & COGs
- Existing Transit Providers
- State & Federal Agencies
- Chamber of Commerce
- Schools & School Districts
- Tribal Govt
- Private Partners
- Social Equity Advocates
- Public/Tribal Health Agencies
- City Planners & Designers
- Transit Program Development Community Partners
Grant Matching Sources

2019 National Tribal Symposium to Advance Transportation Conference

Grant Matching Sources
Grant Matching Sources
## Grant Matching Sources

<table>
<thead>
<tr>
<th>Funding</th>
<th>Amount*</th>
<th>Partnership Source</th>
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<tbody>
<tr>
<td>FTA Section 5311</td>
<td>$235,301</td>
<td>Idaho Department of Transportation</td>
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<td>FTA Section 5311</td>
<td>$108,635</td>
<td>Tribal match</td>
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<tr>
<td>FTA Section 5307</td>
<td>$96,699</td>
<td>Kootenai County (transfer of its Section 5307 to Section 5311)</td>
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<tr>
<td>Tribal Match</td>
<td>$8,407</td>
<td>Tribal match to Section 5307 ($96,699), which was transferred to Section 5311</td>
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<td>FTA Section 5307</td>
<td>$555,036</td>
<td>Section 5307 Kootenai County funds</td>
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<td>FTA Section 5307</td>
<td>$399,380</td>
<td>Tribal match</td>
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<td>FTA Section 5309</td>
<td>$558,113</td>
<td>FTA grant for bus maintenance garage</td>
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<td>Tribal Match</td>
<td>$111,623</td>
<td>Tribal match to Section 5309 funds</td>
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<td>FTA Section 5311(c)</td>
<td>$225,000</td>
<td>FTA Tribal Transit Grant</td>
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<td><strong>Total</strong></td>
<td><strong>$2,298,194</strong></td>
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* 1-year data (FY2007).

Source: Grant Management Office of the Coeur d’Alene Tribe.
Lessons from Innovatively Funded Tribal Transit Systems

No matter its size, every community has unique transit needs; but more importantly, every community has a pool of local resources to tap in order to make transit a reality.

Identifying those local resources/opportunities is step one in developing new mobility options.
How to Draft Project Abstracts

A one to two-page project summary, which includes the following brief sections:

- Applicant Organization
- Need
- Project Objectives
- Evaluation
- Staff
- Budget, Length of Project & Sustainability Plan
- Key Words (to aid in researching additional funding)
How to Draft Project Abstracts

- Research, research, research
- Concisely summarize your project on a few pages
- Please see sample Craig Tribal Association FTA 5311(c) Project Abstract
Gathering Demographic Information

Some important websites for gathering demographics:

- U.S. Census Bureau’s American Fact Finder
  https://factfinder.census.gov/faces/nav/jsf/pages/community_facts.xhtml

- The Annie E. Casey Foundation Kids Count Data Center
  http://datacenter.kidscount.org/

- Youth Risk Behavior Surveillance System
  https://www.cdc.gov/healthyyouth/data/yrbs/index.htm

- Centers for Disease Control and Prevention, WISQARS

- U.S. Department of Transportation, Transportation and Health Indicators
  https://www.transportation.gov/transportation-health-tool/indicators

- Fatality Analysis Reporting System
  https://www-fars.nhtsa.dot.gov/Main/index.aspx

- County Health Rankings and Roadmaps: http://www.countyhealthrankings.org/
Demonstration of Need & Benefits

Paint a strong visual picture of the tribal community and local transit needs/challenges.
Demonstration of Need & Benefits - Vital Demographics

Tribal and Regional Mobility Demographics

- Age
- Income
- Disabilities
- Number of tribal members that are Veterans
- Location of the closest VA clinic or hospital
- Households without vehicles
- Remoteness
- Population Density
- School age population
- Other local mobility options or lack thereof
- Key destinations (e.g., list school locations/enrollment; shopping areas/centers, recreation facilities & areas, major employers, medical, social & human services, etc.)
What is a Goal?

A statement that provides direction toward an intended end.

Should always be simple, concise, broad and include what and who will be affected.

Focus is on what will be achieved.
Goal Statements

An Example

“The goal of the Ring of Power Project is to provide reasonably priced non-polluting energy to the City of Panchovilla.”
Let’s Practice!

- These Worksheets can describe actual transit grant projects that you or your agency would like to develop or they can be fictionalized transit project ideas.

- Complete boxes 1 through 3 over the next few minutes.

- We’ll take a few minutes to share what we’ve written on our Worksheets, and answer questions.
What is an objective?

• A statement that expresses the intended outcome of efforts

• Completion of the objective will lead to reaching the program goal
5 Characteristics of an Objective

• **Specific** – Who, what, where, & how many
• **Measurable** – What is being measured
• **Achievable** – Can be accomplished with available time & resources
• **Relevant** – Appropriate to the program issue
• **Time-phased** – Identifies when objective will be achieved
Let’s Write Some SMART Objectives!

- Please write 2 to 3 SMART objectives in **box 4** of your Project Profile/Planning Worksheet

- After you’ve completed your objectives, those who want to can share the objectives they’ve written.
Budget Development Basics

Create A Detailed Budget Worksheet:

– Either as a Table or a Spreadsheet

– Use the Federal Form (424a) as a guide for the line items, then leave room to expand/insert

– Where you insert the Budget Worksheet depends the directions in the RFP/NOFA

– Create columns for matching numbers based on the RFP/NOFA, as the requirements vary by program & agency
Wrapping Up the Budget Numbers

– Expect that as you develop the rest of the proposal, the budget will be revisited & revised

– Check & Recheck all math!

– Never put anything in a budget without an explanation somewhere in the proposal
Budget Development Basics

Budget Justification (1)

- “Justifications” are also called “details”, “rationales”, or even “budget narratives”
  - The name depends on the funding agency.
  - Budget Justification formats are usually quite flexible, but there are also usually page limits.

Budget Justification (2)

- **Purpose**
  - To say WHY the project needs WHAT

- **Additional Uses**
  - Providing details or breakdowns of line items
  - Showing the math behind the figures
Evaluation Summary

- You WILL evaluate
- Grant agency specifies internal or external
- External strengthens credibility
- Provide more data than requested
- Use a variety of sharing techniques
- **Formative** - changes during project
- **Summative** - outcomes
Let’s Finish our Worksheets!

- Please complete **boxes 5 - 9** of your Project Profile/Planning Worksheet

- After you’ve completed those sections, those who want to can share the objectives they’ve written.

Transit Project Profile/Planning Worksheet
Key Funding Sources

- Indian Housing Block Grant (IHBG)
- Transportation Alternatives Program
- Economic Development Administration (EDA)
- Community Services Block Grants (DHHS)
- USDA, ED, DHHS, DOL, IHS & TANF
- Federal Highways Administration (FHWA)
Writing Competitive Tribal Transit Program Grants

“The primary purpose of these competitively selected grants is to support planning, capital, and, in limited circumstances, operating assistance for tribal public transit services.” --FY17 Tribal Transit Program Federal Register NOFA
“Specific types of projects include:
Capital projects for start-ups, replacement or expansion needs; operating assistance for start-ups; and planning projects up to $25,000.

Indian tribes applying for capital replacement or expansion needs must demonstrate a sustainable source of operating funds for existing or expanded services.” --FY17 Tribal Transit Program

*Federal Register* NOFO
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<th>Table Title</th>
<th>12-month Project Period: 9/1/2015 - 9/30/2016</th>
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<td>a. Transportation Director (0.5 FTE)</td>
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<td>c. Transit Dispatcher/Backup Driver (0.5 FTE)</td>
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<td>d. Lead Transit Bus Driver (0.5 FTE)</td>
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<td>e. Transit Bus Driver (0.5 FTE)</td>
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<td><strong>Fringe Benefits @ 31%</strong></td>
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<td><strong>Travel</strong></td>
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<td>a. National Transit Institute Bus Procurement Workshop, San Jose, CA - Includes airfare, lodging, car rental &amp; per diem</td>
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<td>b. Post-production Bus Inspection, Portland, OR - Includes airfare, lodging, car rental &amp; per diem</td>
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<td>c. 3 Days of on-site training provision of Smith System Defensive Driving &amp; PASS Training for CTA Transit Staff - Includes airfare, lodging &amp; per diem</td>
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<td>d. AK Community Transit Conference for Transit Coordinator, Fairbanks, AK - Includes airfare, lodging, car rental &amp; per diem</td>
<td>3,750</td>
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<td><strong>Equipment</strong></td>
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<td>a. (2) Body-on-Chassis F-550 (20 x 2 Configuration) Buses (@ $113,840/each)</td>
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<td>22,768</td>
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<td><strong>Total for Equipment</strong></td>
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<td><strong>Supplies</strong></td>
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<td>a. Community Meeting Supplies for 3 Community Meetings ($50/Meeting)</td>
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<td>270</td>
<td>270</td>
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<td>b. (2) Desktop Computers with Windows 8.1; (2) 24&quot; Monitors; (2) Keyboards; (1) Color Multifunction Printer; (2) Microsoft Ofc Pro 8.1 Licenses &amp; (2) Acrobat Pro XL 8.1 Licenses</td>
<td>4,000</td>
<td>2,500</td>
<td>6,500</td>
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<td>e. (2) Diamond Manufacturing XV Fareboxes</td>
<td>400</td>
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<td>f. Cassida C200 Coin Sorter/Counter</td>
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<td>g. Cassida SS100U Currency Counter</td>
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<td>h. (3) 5-unit Manual Passenger Boarding Counters @ $190/ea</td>
<td>570</td>
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<td>i. (5) Motorola MOTOTRBO XPR 6500 Portable Two-Way Radios</td>
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<tr>
<td>a. Smith Systems Defensive Driving &amp; PASS Training Facilitator ($500/Day x 3 Days)</td>
<td>0</td>
<td>1,500</td>
<td>1,500</td>
<td></td>
</tr>
<tr>
<td><strong>Total for Contractors</strong></td>
<td></td>
<td>0</td>
<td>1,500</td>
<td>1,500</td>
</tr>
<tr>
<td><strong>Construction</strong></td>
<td></td>
<td>0</td>
<td>2,000</td>
<td>2,000</td>
</tr>
<tr>
<td>a. Limited renovation to leased Craig maintenance facility</td>
<td>0</td>
<td>1,000</td>
<td>1,000</td>
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<tr>
<td>b. Limited renovation for up to (5) existing school district bus stops</td>
<td>0</td>
<td>1,000</td>
<td>1,000</td>
<td></td>
</tr>
<tr>
<td><strong>Total for Construction</strong></td>
<td></td>
<td>0</td>
<td>2,000</td>
<td>2,000</td>
</tr>
<tr>
<td><strong>Other Direct Project Costs</strong></td>
<td></td>
<td>0</td>
<td>14,383</td>
<td>14,383</td>
</tr>
<tr>
<td>a. 3 Transit System Community Introduction Meetings in Craig, Klawock &amp; Hollis (58 Miles x .575/mile)</td>
<td>0</td>
<td>33</td>
<td>33</td>
<td></td>
</tr>
<tr>
<td>b. Design, Printing, Folding &amp; Shipping of 5,000 Transit Passenger Guide Brochures</td>
<td>0</td>
<td>2,050</td>
<td>2,050</td>
<td></td>
</tr>
<tr>
<td>c. Postage/Shipping (Bid Documents, Supplies &amp; Equipment Orders)</td>
<td>0</td>
<td>100</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>d. Maintenance Bldg. Utilities: Phone, Fax, Electric, Natural Gas for 4 months. (Prorated)</td>
<td>0</td>
<td>1,000</td>
<td>1,000</td>
<td></td>
</tr>
<tr>
<td>e. Equipment Maintenance/Repair (e.g., tune-ups, lube, oil, etc.) - for 3 months. (Prorated)</td>
<td>0</td>
<td>1,500</td>
<td>1,500</td>
<td></td>
</tr>
<tr>
<td>f. Monthly Rent for 3 Door Bus Maintenance Building for 4 months. (Prorated)</td>
<td>0</td>
<td>6,000</td>
<td>6,000</td>
<td></td>
</tr>
<tr>
<td>g. 2 months of additional CTA Liability Insurance for CTA exposure on bus stop renovation. (Prorated)</td>
<td>0</td>
<td>200</td>
<td>200</td>
<td></td>
</tr>
<tr>
<td>h. Insurance on Buses and Equipment for 4 months. (Prorated)</td>
<td>0</td>
<td>1,500</td>
<td>1,500</td>
<td></td>
</tr>
<tr>
<td><strong>Total for Other Direct Project Costs</strong></td>
<td></td>
<td>0</td>
<td>14,383</td>
<td>14,383</td>
</tr>
<tr>
<td><strong>PROJECT DIRECT COSTS</strong></td>
<td></td>
<td>240,450</td>
<td>131,919</td>
<td>372,369</td>
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<tr>
<td><strong>PROJECT INDIRECT COSTS - Capped at 10% by the FTA</strong></td>
<td></td>
<td>24,045</td>
<td>13,192</td>
<td>37,237</td>
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<tr>
<td><strong>TOTALS FOR PROJECT</strong></td>
<td></td>
<td>264,495</td>
<td>145,111</td>
<td>409,606</td>
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Sustainable Source of Operating Funds

Financial Capacity

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<tr>
<th>Activity</th>
<th>CURRENT FY</th>
<th>CURRENT FY+1</th>
<th>CURRENT FY+2</th>
<th>CURRENT FY+3</th>
<th>CURRENT FY+4</th>
<th>TOTAL</th>
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<tbody>
<tr>
<td>Administration</td>
<td>$0</td>
<td>$0</td>
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<td>Planning</td>
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<td>Preliminary Engineering</td>
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<td>$0</td>
<td>$0</td>
<td>$0</td>
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<td>$0</td>
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<tr>
<td>Construction</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Construction Engineering</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
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<td>$0</td>
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<tr>
<td>Transit</td>
<td>$45,000</td>
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<td>$100,000</td>
<td>$100,000</td>
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<td>$445,000</td>
</tr>
<tr>
<td>Maintenance</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$45,000</td>
<td>$100,000</td>
<td>$100,000</td>
<td>$100,000</td>
<td>$100,000</td>
<td>$445,000</td>
</tr>
</tbody>
</table>
Resources - Important FTA Circulars

- **FTA C4220 1F - Changes**
- **FTA C4220.1F - Third Party Contracting Guidance**
- **FTA C9040.1G - Formula Grants for Rural Areas**
Contacts

Native American Tribal Liaison

The purpose of Tribal Liaison at NMDOT is to maintain the government-to-government relationships outlined in New Mexico's State-Tribal Collaboration Act and to assure compliance with the federal tribal coordination requirements. The NMDOT increased its participation and partnership with tribal governments significantly since 2004 through completing Memoranda of Agreements (MOAs) and Joint Powers Agreements (JPAs) with all of the pueblos and tribal nations in the State. In addition, New Mexico is one of a small number of states that support and encourage tribal participation in the MPO and RTPO State transportation planning processes. The NMDOT Tribal Liaison is proactive in conducting outreach, mediating misunderstandings between tribal entities and the NMDOT and building close relationships based on experience and accountability.

Ron D. Shutiva, Tribal Liaison
Phone: 505-670-5465
Ron.Shutiva@state.nm.us

https://www.fhwa.dot.gov/planning/processes/tribal/contacts/contacts_state.cfm
http://dot.alaska.gov/tribalrelations/
Resources

- Indian Entities Recognized and Eligible to Receive Services From the United States Bureau of Indian Affairs - *Federal Register*, Volume 79, Number 19, issued January 29, 2014
- FTA Section 5311 Non-Urbanized Formula Program Guidance
- FTA Program Management Circular 5010
- *Becoming a Region 10 New Grantee* Packet
- FTA Tribal Transit Program Website: [http://www.fta.dot.gov/grants/15926_3553.html](http://www.fta.dot.gov/grants/15926_3553.html)
- FTA Master Agreement for Tribal Programs
Feel free to contact:

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Fax: 928.649.9607
mgtecwtg@gmail.com