Date: November 15, 2023
W.I.: 1310
Referred by: PAC
Revised: 11/19/25-C 01/28/26-C
02/25/26-C 05/27/26-C

ABSTRACT

Resolution No. 4604, Revised

This resolution adopts MTC's First Cycle Community Action Resource and Empowerment (CARE) Program Guidelines.

The following attachment is provided with this Resolution:

- Attachment A — First Cycle Community Action Resource and Empowerment (CARE) Program Guidelines and Funding Fiscal Year (FY) 2022-23 through FY 2025-26.

On November 19, 2025, Attachment A was revised to reflect updated funding information.

On January 28, 2026, Attachment A was revised to reflect updated funding information.

On February 25, 2026, Attachment A was revised to reflect updated funding information and program guidance.

On May 27, 2026, Attachment A was revised to reflect updated funding information and program guidance.

Further discussion of the CARE Guidelines is provided in the Programming and Allocations Committee Summary sheet dated November 8, 2023, November 12, 2025, January 14, 2026, February 11, 2026, and May 13, 2026.

Date: November 15, 2023
W.I.: 1310
Referred by: PAC

RE: First Cycle Community Action Resource and Empowerment (CARE) Program Guidelines

METROPOLITAN TRANSPORTATION COMMISSION
RESOLUTION NO. 4604

WHEREAS, the Metropolitan Transportation Commission (MTC) is the Regional Transportation Planning Agency (RTPA) for the San Francisco Bay Area pursuant to Government Code Section 66500 *et seq*.; and

WHEREAS, MTC adopted Resolution No. 4505, which established the One Bay Area Grant Program (OBAG 3) Project Selection and Programming Policies for programming FY2022-23 through FY 2025-26 federal Surface Transportation Block Grant Program (STP) and Congestion Mitigation and Air Quality Improvement Program (CMAQ) funds; and

WHEREAS, MTC adopted Resolution No. 4548, which authorized an allocation request and established a funding plan for MTC's Regional Early Action Plan (REAP 2.0) formula funds; and

WHEREAS, MTC Resolution Nos.4505, Revised, 4548, and 3989, Revised, program OBAG 3, MTC Exchange Program and REAP 2.0 funds towards Community Choice initiatives; and

WHEREAS, MTC renamed "Community Choice" to the "Community Action Resource and Empowerment (CARE)" Program; and

WHEREAS, MTC has conducted a program evaluation of the Lifeline Transportation Program resulting in the design and formation of the Community Action Resource and Empowerment (CARE) Program; and

WHEREAS, MTC will use the process and criteria set forth in Attachment A of this Resolution to fund a Cycle 1 program of projects for the Community Action Resource and Empowerment (CARE) Program; now, therefore be it

RESOLVED, that MTC approves the program guidelines to be used in the administration and selection of the Cycle 1 CARE projects, as set forth in Attachment A of this Resolution; and be it further

RESOLVED, the Executive Director of MTC shall forward a copy of this Resolution, and such other information as may be required, to such other agencies as may be appropriate.

METROPOLITAN TRANSPORTATION COMMISSION

_____

Alfredo Pedroza, Chair

The above Resolution was entered into by the Metropolitan Transportation Commission at a regular meeting of the Commission held in San Francisco, California and at other remote locations on November 15, 2023.

METROPOLITAN
TRANSPORTATION
COMMISSION

Community Action Resource and Empowerment (CARE) Program Cycle 1 Guidelines

METROPOLITAN TRANSPORTATION COMMISSION

COMMUNITY ACTION RESOURCE AND EMPOWERMENT (CARE) PROGRAM CYCLE 1 GUIDELINES

FY 2022-23 AND FY 2025-26

Table of Contents

1. BACKGROUND. 3
2. PROGRAM MISSION AND GOALS 3
3. PROGRAM ADMINISTRATION. 5
4. FUNDING AVAILABILITY. 5
5. ELIGIBLE LOCATION, RECIPIENTS/SUBRECIPIENTS 8
6. REAP 2.0 AND FEDERAL OBAG PROGRAMMING PROCESS....8
7. ELIGIBLE ACTIVITIES 9
8. LOCAL MATCHING REQUIREMENTS....10
9. COORDINATED PLANNING....10
10. GRANT APPLICATION. 10
11. APPLICATION EVALUATION 11
12. POLICY BOARD ADOPTION....11
13. PROJECT DELIVERY 11
14. PROJECT OVERSIGHT....12
15. PERFORMANCE MEASURES 12
16. FUND ADMINISTRATION....12
17. COMPLIANCE WITH FEDERAL REQUIREMENTS 12
18. TIMELINE. 13

Appendix 1. Funding Source Information
Appendix 2. Standard Evaluation Criteria
Appendix 3. Community-Based Transportation Plan Project Development Technical Assistance Program Guidelines
Appendix 4. Participatory Budgeting and Implementation Program Guidelines

METROPOLITAN TRANSPORTATION COMMISSION
COMMUNITY ACTION RESOURCE AND EMPOWERMENT (CARE) PROGRAM
CYCLE 1 GUIDELINES

FY 2022-23 AND FY 2025-26

1. BACKGROUND. The Community Action Resource and Empowerment (CARE) Program establishes the policy framework and commitments for supporting community-led transportation enhancements in Equity Priority Communities as referenced in Plan Bay Area 2050 (PBA2050): Implementation Strategy. PBA2050 outlines the region's Long-Range Plan, incorporating equity through investments and policies that affect historically and systemically marginalized, underserved and excluded groups, including people with low incomes, people with disabilities and communities of color. Funds for the program come from a four-year period covering federal fiscal years (FY) 2022-23 through FY 2025-26. Attachment A outlines the CARE program mission, goals, objectives, funding availability, program architecture, and programming policies.

   Since 2005, the Lifeline Transportation Program (LTP) supported and advanced projects identified in Community Based Transportation Plans and the Coordinated Public Transit-Human Services Transportation Plan. The LTP was redesigned to form the Community Action Resource and Empowerment Program (CARE) to address administrative fund source barriers, to better align and advance high priority community-based transportation plans with project implementation, and to strengthen community assets by better resourcing community relationship and power-building.

2. PROGRAM MISSION AND GOALS. The Community Action Resource and Empowerment (CARE) Program is a capacity building, technical assistance, and participatory budgeting grant program for under-resourced communities (i.e., Equity Priority Communities, Priority Populations) in the 9-county Bay Area region.

   a. Mission:

      i. To provide under-resourced communities (i.e., Equity Priority Communities, Priority Populations) with the opportunity to advance high priority community-based, multi-sector transportation-housing-climate initiatives that improve mobility.

      ii. To support community leaders in transformative change, working effectively in diverse, ambiguous, and challenging contexts in achieving multi-beneficial transportation mobility, housing, and climate outcomes.

   b. Goals: The goals of the program are to:

      i. Strengthen multi-sector partnerships to advance more impactful, intersectional, and innovative projects. These initiatives must:

         - Address transportation gaps and/or barriers identified in Community-Based Transportation Plans (CBTP), MTC Coordinated Public Transit-Human Services Transportation Plan, or other substantive local planning efforts involving focused outreach to low-income populations. While preference will be given to community-based plan priorities, strategies emerging from

countywide or regional welfare-to-work transportation plans, or other documented assessment of need within the designated Equity Priority Community will also be considered. Findings emerging from one or more CBTPs or other relevant planning efforts may also be applied to other low-income areas, or otherwise be directed to serving low-income constituencies within the county, as applicable.

- Support the development of projects to close the race and equity gap.
- Invest in historically underserved communities, which may include projects prioritized in a Community-Based Transportation Planning (CBTP) or Participatory Budgeting process, or projects located within Equity Priority Communities with demonstrated community support. Equity Priority Communities are defined in Chapter 1 Plan Bay Area 2050 and described at https://mtc.ca.gov/planning/transportation/access-equity-mobility/equitypriority-communities;
- Advance project readiness and further develop priority community ideas or concepts so that projects/initiatives can become competitive for local, state, and/or federal fund sources.

ii. Build community power and engagement.

- Acknowledge and grow community leadership and knowledge.
- Build mutually beneficial relationships for meaningful, inclusive collaboration that includes outreach, education and broad partnerships among a variety of stakeholders such as public agencies, transit operators, community-based organizations, residents, and underrepresented, overburdened groups.

iii. Support intersectional leadership and expertise with particular focus on increasing access to funding and resources for project planning and implementation within under-resourced communities to advance Community Based Transportation Plans or Coordinated Public Transit-Human Services Transportation Plan strategies.

- Improve diverse range of transportation solutions, and in particular transportation needs specific to older adults, youth, and people with disabilities of low-income communities.

3. PROGRAM ADMINISTRATION. The CARE Program will be administered by MTC, supported by county transportation agencies (CTAs) or other designated county-wide agencies as follows:

County	CARE Program Liaison
Alameda	Alameda County Transportation Commission
Contra Costa	Contra Costa Transportation Authority
Marin	Transportation Authority of Marin
Napa	Napa Valley Transportation Authority
San Francisco	San Francisco County Transportation Authority
San Mateo	City/County Association of Governments
Santa Clara	Santa Clara Valley Transportation Authority and Santa Clara County
Solano	Solano Transportation Authority
Sonoma	Sonoma County Transportation Authority

This involves CTA coordination and a full commitment to a broad, inclusive public involvement process and using multiple methods of public outreach. Methods of public outreach include but are not limited to highlighting the program and application solicitation on the CTA website; sending e-mails to local community-based organizations, city departments, and non-profit organizations (particularly those that have previously participated in local planning processes); and contacting local elected officials and their staffs. Further guidance for public involvement is contained in MTC's Public Participation Plan.

For projects involving federal funds, MTC and CARE Program Liaisons must also consider fair and equitable outreach and selection of project candidates in accordance with federal Title VI requirements, i.e., funds must be distributed without regard to race, color, and national origin.

4. FUNDING AVAILABILITY. Fund sources for the Cycle 1 CARE Program (FY2022-23 through FY2025-26) include State Regional Early Action Planning Grant Program (REAP) 2.0 funds[11], State Transit Assistance (STA,) and One Bay Area Grant (OBAG), which encompasses federal Surface Transportation Program (STP), Congestion Mitigation and Air Quality Improvement (CMAQ), and other local funds available to MTC, as shown in Table A. CMAQ funds may be used for eligible projects that demonstrate air quality benefits and implement Plan Bay Area's climate initiative goals and priorities.

Funding for CARE from REAP 2.0, STA, and OBAG will be assigned a minimum of $1M to counties, for eligible projects based on a competitive process to be conducted by MTC and in coordination with CARE Program Liaisons in each county. All funded projects must meet the eligibility requirements of the respective funding source. See Appendix 1 for detailed eligibility requirements by fund source.

[1] REAP 2.0 Guidelines https://www.hcd.ca.gov/docs/grants-and-funding/mpo-reap-2-0-final-guidelines.pdf

Table A: Funding Available FY2022-23 through FY2025-26

FUND SOURCE	CARE PROGRAM COMPONENTS			PROGRAM TOTAL (in millions)
	Project Development Technical Assistance for a CBTP Project*	**Participatory Budgeting and Implementation (PBI) ~~Implementation of Neighborhood-level Projects (capital)~~**	**Community Power-Building and Engagement (Pb+E)**	**Overall CARE Program Total (in millions)**
OBAG 3**	$0	$0	$0	$0
OBAG 4**	$0	$2.4	$0	$2.4
Exchange***	$12.0	~~$0~~ $7.6	$3.0	~~$15.0~~ $22.6
REAP 2	$0	$0	$2.0	$ 2.0
STA	$0	$2.4	$0	$2.4
Total	**$12.0**	**~~$0~~ $12.4**	**$5.0**	**~~$17.0~~ $29.4**
*Also includes strategies in MTC's Coordinated Plan or other substantive local planning effort. ** Local match of 11.47% required if federal funds are awarded ***Community power-building and engagement includes $3.0 million in local/Exchange Program funds available to MTC within the OBAG framework.				
Minimum Project Amount	$250K	~~$250K~~ $50K	$20K	
Award Amounts	Minimum: $1M for each of the 9-Counties Total for CARE Maximum: No County will receive more than 50% of the funding available.			

Table B. County Funding Targets*

County	Project Development Technical Assistance for a CBTP Project**	Participatory Budgeting and Implementation***
Alameda	$2,379,000	$2,379,000
Contra Costa	$1,692,000	$1,692,000
Marin	$668,000	$668,000
Napa	$562,000	$562,000
San Francisco	$1,456,000	$1,456,000
San Mateo	$1,095,000	$1,095,000
Santa Clara	$2,110,000	$2,110,000
Solano	$1,044,000	$1,044,000
Sonoma	$994,000	$994,000
Total	**$12,000,000**	**$12,000,000**

* Pb+E funds were allocated through an MTC-led call for projects, with funding awarded on a project basis. A list of awarded Pb+E projects is available on the MTC website.

**Funding targets are subject to change. See Appendix 3 for additional funding details.

***Funding targets are subject to change. See Appendix 4 for additional funding details, including a $400,000 PB set-aside not included in the County Funding Targets

a. Local Fund Exchanges. Project Sponsors have the discretion to use local fund exchanges to fund projects that are not otherwise eligible for the state and federal funds in Cycle 1. Project Sponsors must notify MTC about their intent to exchange funds, and MTC staff will review and approve the exchanges on a case-by-case basis. MTC staff is supportive of these fund exchanges to the extent that the exchange projects meet the spirit of the CARE Program.

5. ELIGIBLE LOCATION, RECIPIENTS/SUBRECIPIENTS

a. Eligible Locations. All projects must be located in one or more of the following locations:
   - Equity Priority Communities (EPCs)
   - Priority Development Areas (PDAs)
   - Bay Area Air Quality Management District's (BAAQMD) Community Air Risk Evaluation Program Area or similar local designation

b. REAP 2.0. Project sponsors selected for REAP funds through the CARE program may include: Bay Area counties, cities, a city and county, transit agencies or districts, county transportation agencies, Tribal Entities, community-based organizations, Public Housing Authorities, academic institutions, school districts, special districts, developers of Affordable Housing, or regional Housing Trust Fund (https://www.hcd.ca.gov/docs/grants-and-funding/mpo-reap-2-0-final-guidelines.pdf).

c. OBAG and Exchange. Project sponsors selected for OBAG or Exchange funding through the CARE program may include: Bay Area cities, counties, transit agencies, federally recognized Tribal governments, and County Transportation Agencies (CTAs). Non-profit organizations are eligible for Exchange funds, and eligible for OBAG funds if they partner with an eligible OBAG recipient (e.g., CTA, transit operator) that is willing to serve as the recipient of the funds and pass through the funds to the non-profit, and if they have an eligible project.

d. STA. Project sponsors selected for STA funding through the CARE program must be transit operators.

6. REAP 2.0 AND FEDERAL OBAG PROGRAMMING PROCESS. For REAP 2.0 and OBAG funds, MTC will solicit applications, in collaboration with CARE Program Liaisons.

a. Outreach - Consistent with MTC's Public Participation Plan and FTA's Title VI Circular (FTA C 4702.1B), MTC will conduct a broad, inclusive public involvement process, and use multiple methods of public outreach in collaboration with CARE Program Liaisons.

   Methods of public outreach may include, but are not limited to, highlighting the program and application solicitation on websites, and sending e-mails to all prospective applicants, including those that serve predominantly minority and low-income populations.

b. Competitive Process. The CARE Program is a competitive grant program within the OBAG ~~3~~ and/or REAP 2.0 framework. Projects will be selected through an open, competitive process.

c. Multi-Year Programming: The First Cycle CARE Program will cover a four-year

programming cycle, with funds available from FY2022-2023 to FY2025-2026.

7. ELIGIBLE ACTIVITIES
   a. Eligible Categories: Projects must advance "Community Based Transportation Plan" projects or strategies within "MTC's Coordinated Public Transit-Human Services Transportation Plan" (or other substantive local planning efforts involving focused outreach to low-income populations) through:
      i. Category 1: CBTP project development technical assistance
      ii. Category 2: Participatory Budgeting Process, CBTP Planning, and Implementation of ~~or Advancing~~ High-priority neighborhood level projects through similar extensive outreach/engagement process
      iii. Category 3: Community power-building and engagement initiatives

   b. Eligible capital projects. Eligible capital projects, consistent with requirements of funding sources, may include (but are not limited to); bus stop improvements, including accessibility enhancements, the provision of bus shelters, benches, lighting, or sidewalk improvements at or near transit stops; art and cultural placemaking, rehabilitation, safety or modernization improvements; non-transit projects such as bike lanes, complete streets, streetscape improvements, safety improvements, crosswalk improvements; or other enhancements to improve transportation access for residents of low-income communities or people with disabilities. See Appendix 1 for additional details about eligibility by funding source.

   c. Projects must be eligible for STP, ~~or~~ CMAQ, ~~or~~ REAP, or STA.
      i. For STP or CMAQ funds, refer to details in 23 USC Sec. 133 and at https://www.fhwa.dot.gov/fastact/factsheets/stbgfs.cfm (STP), and in 23 USC Sec. 149 and at https://www.fhwa.dot.gov/environment/air_quality/cmaq/policy_and_guidance/ (CMAQ); Consistent with Plan Bay Area 2050, available at https://planbayarea.org/; and meet all OBAG ~~3~~ programming policy requirements described in these guidelines and in MTC Resolution 4505 or 4740. Note: Projects selected for local funds within the OBAG framework do not need to meet STP/CMAQ eligibility requirements.

      ii. For REAP funds, see Section 204 of REAP 2.0 Guidelines: https://www.hcd.ca.gov/sites/default/files/docs/grants-and-funding/MPO-REAP-2-0-Final-Guidelines.pdf. Activities generally may include: Technical assistance, planning, staffing, consultant needs (CARE/CBTP or Coordinated Plan related). Projects must support one or more of the following REAP 2.0 objectives:
         a) Accelerating infill development that facilitates housing supply, choice, and affordability through various planning programs, or services;
         b) Realizing multimodal communities through programs, plans, and implementation actions shifting travel behavior by reducing driving through programs, ordinances, funds, and other mechanisms;
         c) Shifting travel behavior through reducing driving; and,
         d) Increasing transit ridership through implementation actions, and planning.

iii. For exchange funds, projects must meet CARE goals.
iv. For STA funds, projects must be capital transit improvements that meet CARE goals. More information on eligible uses may be found in the Caltrans Transportation Development Act Guidebook: https://dot.ca.gov/programs/rail/transportation-development-act.

8. LOCAL MATCHING REQUIREMENTS. The CARE Program requires a minimum local match of 11.47% of the total project cost for projects awarded federal funds.

   a. Exceptions to the local match requirement:

      i. Projects selected for Community Power-Building and Engagement will be funded with local funds and do not require a local match.

      ii. Exchange funds are not subject to the local match requirement.

   b. Sources of local match. Project sponsors may use certain state, or local funding sources (Transportation Development Act, operator-controlled State Transit Assistance, local sales tax revenue, etc.) to meet the match requirement. In-kind contributions such as the market value of in-kind contributions integral to the project may be counted as a contribution toward local share.

      Toll Credits are not an eligible source of local match for the CARE Program. However, for capital projects, sponsors that fully fund the project development or Preliminary Engineering (PE) phase with non-federal funds may use toll credits in lieu of a match for the Construction (CON) phase. For these projects, sponsors must still meet all federal requirements for the PE phase.

9. COORDINATED PLANNING. In the Bay Area's Coordinated Plan, through community outreach and engagement, MTC continues to identify the transportation needs of individuals with disabilities, older adults, and people with low incomes, and to provide strategies for meeting those local needs. Therefore, projects funded with CARE Transportation Program funds should be consistent with the transportation needs, proposed solutions, and enhanced coordination strategies presented in the Coordinated Plan.

   Mobility management is among key coordination strategies recommended in the plan. The designation of and funding for countywide mobility managers is identified as an essential component of that strategy. For more information on the strategies within the Coordinated Plan, please see: mtc.ca.gov\coordinatedplan.

10. GRANT APPLICATION. To ensure a streamlined application process for project sponsors, a universal application form will be used. The application and guidelines are informed by input from the "call for project ideas" process. If a project proposal is a universally, regionally applied project, the project proposal could be elevated to a regional project.
    a. Applications for projects eligible for CMAQ funds must also provide inputs for air quality improvement calculations, using the Supplemental Air Quality Inputs v.1.1 template.

11. APPLICATION EVALUATION. Per OBAG ~~3~~ federal funding and REAP 2.0 guidelines, MTC evaluates and selects projects. MTC staff may solicit input from a panel of stakeholders, reflecting diverse perspectives to inform and advise MTC decision-making.

    a. Evaluation criteria. Standard evaluation criteria will be used to assess projects. The six criteria include (1) project need/goals and objectives, (2) community-identified priority, (3) implementation plan and project management capacity, (4) coordination and program outreach, (5) cost-effectiveness and performance indicators, and (6) project budget/sustainability. MTC will establish the weight to be assigned for each criterion in the assessment process.

    b. Selection criteria considerations. In addition to the evaluation criteria, projects will be selected with considerations to the following: (1) geographic diversity; (2) need, with a priority on lower-capacity communities; and (3) range of project types: diverse range of project types, interdisciplinary approach, and focus on equity.

    See Appendix 2 for the detailed standard evaluation criteria.
    See Appendix 3 for detailed evaluation criteria for CBTP Project Development Technical Assistance.
    See Appendix 4 for detailed evaluation criteria for Participatory Budgeting and Implementation.

12. POLICY BOARD ADOPTION

a. Project sponsor resolution of local support. As part of the grant award, project sponsors will be required to adopt a resolution of local support. The resolution shall state that the local project sponsors understand and agree to meeting all project delivery, funding match and eligibility requirements, and obligation and reporting deadlines and requirements. MTC will provide a resolution of local support template. This requirement only applies to project sponsors awarded federal funds.

13. PROJECT DELIVERY. All projects funded under the county programs are subject to the following MTC project delivery requirements:

    a. REAP 2.0. If selected for REAP 2.0 funding, project sponsors must expend the CARE REAP 2.0 funds by December 31, 2026, or earlier, as required by the individual CARE program The December deadline is established by state statute (Chapter 3.15 of California Health and Safety Code sections 50515.06 to 50515.10) and is the date by which MTC must fully expend its REAP 2 grant.

    b. OBAG 3. If selected for OBAG 3 funding, project sponsors must obligate CARE Program OBAG 3 funds by **January 31, 2027,** per OBAG 3 program deadline. Note: Project awards will be cancelled, and funds will be reverted for use in future CARE Program grants if projects are not obligated by January 31, 2027.

    c. OBAG 4. If selected for OBAG 4 funding, project sponsors must obligate CARE Program OBAG 4 funds by **September 30, 2031,** per OBAG 4 program deadline. Note: Project awards will be cancelled, and funds will be reverted for use in future CARE Program grants if projects are not obligated by September 30, 2031.

14. PROJECT OVERSIGHT. All project budget and scope of work changes must be approved by MTC CARE staff. All scope changes must be fully explained and must demonstrate consistency with CARE Program goals. Project sponsors must have a record of consistently meeting state and federal timely use of funds deadlines and requirements or demonstrate/identify revised/new internal processes to ensure they will meet funding deadlines and requirements moving forward at the time of project nomination.

    See Appendix 1 for detailed accountability and reporting requirements by funding source.

15. PERFORMANCE MEASURES. As part of the Call for Projects, applicants will be asked to establish project goals, and to identify basic performance indicators to be collected in order to measure the effectiveness of the CARE projects. At a minimum, performance measures projects could include documentation of outcome-based metrics provided with the funding, and a qualitative summary of procedures employed for the project. For capital projects, project sponsors are responsible for establishing milestones and reporting on the status of project delivery. Project sponsors are responsible for satisfying all reporting requirements, as referenced in Appendix 1. Project sponsors will forward reports containing performance measures to MTC for review and overall monitoring of the CARE Program.

16. FUND ADMINISTRATION

    a. OBAG. Project sponsors are responsible for entering OBAG funded projects into MTC's Fund Management System (FMS) for inclusion in the Transportation Improvement Program (TIP). Grantees will access their funds through the Caltrans federal-aid process.

    b. REAP 2.0. Project sponsors selected for REAP 2.0 funds are responsible for complying with fund administration and reporting requirements as stipulated in funding agreements with MTC or another pass-through agency. Eligible entities for REAP include community-based organizations (CBO), which can be their own project sponsor. MTC would enter into a funding agreement with the CBO directly.

    c. STA. Project sponsors selected for STA funds will access funds through the existing MTC claims process. Transit agencies receiving STA funds for a CARE project will incorporate the project into their annual claim workbook or amend their existing claim workbook if already submitted.

17. COMPLIANCE WITH FEDERAL REQUIREMENTS.

    a. Project Sponsor Responsibilities. OBAG applicants are required to comply with MTC's Regional Project Delivery Policy, MTC Resolution No. 3606 and all applicable federal requirements.

18. TIMELINE. The anticipated timeline for Cycle 1 is as follows:

Fund Source	Action	Anticipated Date*
All	Commission approves Cycle 1 Program Guidelines	November 15, 2023
REAP 2.0	MTC launches Power-building and Engagement Call for Projects process, in coordination with County Transportation Agencies (CTAs)	September 2, 2025
REAP 2.0/ Exchange	Application deadline for Project Sponsors to submit eligible project(s) to MTC	October 9, 2025
REAP2.0/ Exchange	MTC Commission approval of Program of Projects (Added Round – Round 2)	November 19, 2025 January 2026
REAP 2.0/ Exchange	Project Sponsor notification of Power-building and Engagement award. Round 2	December 1, 2025* February 2026*
Exchange	MTC opens CTA-led project nomination process for CBTP Project Development Technical Assistance.	February 2026
REAP 2.0/ Exchange	Project sponsors awarded REAP and Exchange funds submit project(s) in MTC's fund system. Round 2	March 1, 2026* April 2026*
OBAG/ Exchange/ STA	MTC opens CTA-led project nomination process for Participatory Budgeting and Implementation.	May 2026
OBAG/ Exchange/ STA	Project nominations deadline for CBTP Project Development Technical Assistance and Participatory Budgeting and Implementation Phase 1.	October 2026*
OBAG/ Exchange/ STA	MTC Commission approval of projects for CBTP Project Development Technical Assistance and Participatory Budgeting and Implementation Phase 1.	Early 2027*
OBAG/ Exchange/ STA	Project nominations deadline for Participatory Budgeting and Implementation Phase 2.	Summer 2027
OBAG/ Exchange/ STA	MTC Commission approval of projects Participatory Budgeting and Implementation Phase 2.	Fall 2027

*All dates are subject to change.

Appendix 1
Community Action Resource and Empowerment (CARE) Program Cycle 1
Funding Source Information

	One Bay Area Grant Program (OBAG)	Regional Early Action Planning (REAP 2.0)	State Transit Assistance (STA)
Purpose of Fund Source	The One Bay Area Grant, now in its ~~third~~ fourth iteration, guides how MTC distributes federal transportation funding from the Federal Highway Administration to projects and programs that improve safety, spur economic development, and help the Bay Area meet climate change and air quality improvement goals.	To accelerate infill housing development, reduce Vehicle Miles Traveled (VMT), increase housing supply at all affordability levels, affirmatively further fair housing (AFFH).	To improve transit systems statewide.
Detailed Guidelines	**OBAG 3:** https://mtc.ca.gov/digital-library/5022851-obag-3-appendix-1-county-local-program-call-projects-guidelines **OBAG 4:** https://mtc.ca.gov/digital-library/5135523-one-bay-area-grant-obag-4-mtc-resolution-no-4740-revised-february-2026	https://www.hcd.ca.gov/sites/default/files/docs/grants-and-funding/MPO-REAP-2-0-Final-Guidelines.pdf	https://dot.ca.gov/programs/rail/transportation-development-act
Eligible Recipients	Bay Area cities, counties, transit agencies, federally recognized Tribal governments, and County Transportation Agencies (CTAs) are eligible to apply for OBAG funds. Non-profit organizations are only eligible for OBAG funds if they partner with an eligible OBAG recipient (e.g., CTA, transit operator) that is willing to serve as the recipient of the funds and pass through the funds to the non-profit, and if they have an eligible project.	Bay Area cities, counties, transit agencies, federally recognized Tribal governments, County Transportation Agencies (CTAs), community-based organizations, Public Housing Authorities, academic institutions, school districts, special districts, developers of Affordable Housing, or regional Housing Trust Fund.	Transit operators

	One Bay Area Grant Program (OBAG)	Regional Early Action Planning (REAP 2.0)	State Transit Assistance (STA)
Eligible Sub-recipients **(must partner with an eligible recipient that will serve as a pass-through agency)**	Other entities, such as non-profit organizations and community-based organizations may apply as co- applicants, under an agreement with an eligible recipient.	Other entities may apply as co-applicants, under an agreement with an eligible recipient.	N/A
Eligible Projects	Projects must be: Eligible for STP or CMAQ funds, as detailed in 23 USC Sec. 133 and at https://www.fhwa.dot.gov/fastact/factsheets/stbgfs.cf m (STP), and in 23 USC Sec. 149 and at https://www.fhwa.dot.gov/environment/air_quality/c maq/policy_and_guidance/ Consistent with Plan Bay Area 2050, available at https://www.planbayarea.org/; and Meet all OBAG 3 or OBAG 4 programming policy requirements described in these guidelines and in MTC Resolution 4505 and 4740, respectively. Focus areas: 1. "Community Based Transportation Plan" Project Development or "Coordinated Plan" strategy. 2. High-Priority Neighborhood Level Project Implementation/Participatory Budgeting (PB); - Technical assistance for implementation of a PB process - Project Implementation: Funding projects resulting from a PB process, eligible for REAP funding (capital)	See Section 204 of REAP 2.0 Guidelines: https://www.hcd.ca.gov/sites/default/files/docs/grants-and-funding/MPO-REAP-2-0-Final-Guidelines.pdf Activities generally may include: • Technical assistance, planning, staffing, consultant needs (CARE/CBTP/Coordinated Plan related) • Outreach and engagement activities • Project must support one or more of the following categories: a. Accelerating Infill Development that facilitates Housing supply, choice, and affordability through various planning programs, or services. b. Realizing multimodal communities through programs, plans, and implementation actions c. Shifting travel behavior by reducing driving through programs, ordinances, funds, and other mechanisms; and d. Increasing transit ridership through implementation actions, and planning Focus areas: 1. "Community Based Transportation Plan" Project	Transit improvement projects

	One Bay Area Grant Program (OBAG)	Regional Early Action Planning (REAP 2.0)	State Transit Assistance (STA)
	3. Community Power-Building and Engagement - Customized outreach and engagement activities by community-based organizations (CBOs) focused on low-income, underserved groups. - Capacity Building for CBOs and local government to advance CBTPs.	Development or "Coordinated Plan" strategy. 2. High-Priority Neighborhood Level Project Implementation/Participatory Budgeting (PB): - Technical assistance for implementation of a PB process - Project Implementation: Funding projects resulting from a PB process, eligible for REAP funding (capital) 3. Community Power-Building and Engagement - Outreach and engagement activities are eligible as priority setting and components of other proposed uses.	
CARE Program Local Match	11.47% No local match required for Community Power-Building and Engagement or Exchange	No local match is required for REAP 2 funding.	No local match is required for STA funding.
Estimated timing for availability of funds to project sponsor	Eligible project sponsors may initiate the Transportation Improvement Program (TIP) programming request process to program their project in the TIP immediately following MTC approval of program of projects. After the project is in the approved TIP, sponsors may seek to obligate the funds through the Caltrans federal-aid process. Funds will be available on a reimbursement basis after the funds have been obligated. For sub recipients, the eligible recipient acting as fiscal agent will likely initiate a funding	For sub recipients, the eligible recipient acting as fiscal agent will likely initiate a funding agreement following MTC approval of programs of projects. Funds will be available on a reimbursement basis after execution of the agreement.	Funds will be available on a reimbursement basis after allocation.

	One Bay Area Grant Program (OBAG)	Regional Early Action Planning (REAP 2.0)	State Transit Assistance (STA)
	agreement following MTC approval of programs of projects. Funds will be available on a reimbursement basis after execution of the agreement.		
Accountability & Reporting Requirements	Eligible sponsors (i.e., cities and counties) must submit performance (i.e., outcome-based performance metrics) statistics for the project, to CARE Program Administrators and MTC. Depending on the arrangement with a pass-through agency, sub recipients will likely submit quarterly performance reports with invoices, first to the pass-through agency for reimbursement, and then to CARE Program Administrators and MTC for review.	Eligible sponsors (i.e., cities and counties) must submit performance (i.e., outcome-based performance metrics) statistics for the project, to CARE Program Administrators and MTC. Grantees are responsible for following all applicable REAP 2.0 requirements for preparing and maintaining their grants. Depending on the arrangement with a pass-through agency, sub recipients will likely submit quarterly performance reports with invoices, first to CARE Program Administrators for review, and then to the pass-through agency for reimbursement.	Eligible sponsors (i.e., cities and counties) must submit performance (i.e., outcome-based performance metrics) statistics for the project, to CARE Program Administrators and MTC. Requirements will align with CARE Program Guidelines.

Note: Information on this chart is accurate as of August 2023. MTC will strive to make CARE Program Administrators aware of any changes to fund source guidelines that may be enacted by the appropriating agencies (i.e., HCD, FHWA)

Appendix 2
CARE Program Cycle 1
Standard Evaluation Criteria

The following standard evaluation criteria are intended to provide consistent guidance in prioritizing and selecting projects to receive CARE Program funds. MTC, in consultation with other stakeholder representatives, will consider these criteria when selecting projects, and establish the weight to be assigned to each of the criterion. MTC staff will review the proposed county program criteria to ensure consistency and to facilitate coordination among county programs.

a. Project Need/Goals and Objectives: Applicants should describe the unmet transportation need or gap that the proposed project seeks to address and the relevant planning effort that documents the need. Describe how project activities will mitigate the transportation need. Project application should clearly state the overall program goals and objectives and demonstrate how the project is consistent with the goals of the CARE Program.

b. Community-Identified Priority: Priority should be given to projects that directly address transportation gaps and/or barriers identified through a Community-Based Transportation Plan (CBTP), MTC's Coordinated Public Transit-Human Services Transportation Plan, or other substantive local planning effort involving focused inclusive engagement to low-income populations. Applicants should identify the CBTP, Coordinated Plan or other substantive local planning effort, as well as the priority given to the project in the plan.

Other projects may also be considered, such as those that address transportation needs identified in countywide or regional welfare-to-work transportation plans, or other documented assessment of needs within designated Equity Priority Communities. Findings emerging from one or more CBTPs or other relevant planning efforts may also be applied to other low-income areas, or otherwise be directed to serving low-income constituencies within the county, as applicable. Equity Priority Communities are defined in Chapter 1 Plan Bay Area 2050 and described at https://mtc.ca.gov/planning/transportation/access-equity-mobility/equity-priority-communities.

c. Implementation Plan and Project Management Capacity: For projects seeking funds for capital purposes, applicants must provide an implementation plan, milestones, and timelines for completing the project.

Priority should be given to projects that are ready to be implemented in the timeframe that the funding is available.

Project sponsors should describe and provide evidence of their organization's ability to provide and manage the proposed project, including experience serving low-income persons, and experience as a recipient of state or federal transportation funds.

d. Coordination and Program Outreach: Proposed projects will be evaluated based on their ability to coordinate with community stakeholders. Applicants should clearly identify project stakeholders, and how they will keep stakeholders involved and informed throughout the project. Applicants should also describe how the project will be marketed and promoted to the public.

e. Cost-Effectiveness and Performance Indicators: The project will be evaluated based on the applicant's ability to demonstrate that the project is the most appropriate way in which to address the identified transportation need and is a cost-effective approach. Applicants must also identify clear, measurable outcome-based performance measures to track the effectiveness of the project in meeting the identified goals. A plan should be provided for ongoing monitoring and evaluation of the project, as well as steps to be taken if original goals are not achieved.

f. Project Budget/Sustainability: Applicants must submit a clearly defined project budget, indicating anticipated project expenditures and/or revenues, including documentation of matching funds (OBAG/REAP). Proposals should address long-term efforts and identify potential funding sources for sustaining the project beyond the grant period.

Appendix 3
CARE Program Cycle 1
Community-Based Transportation Plan Project Development Technical Assistance (CBTP TA) Program Guidelines

Contents

1. Overview 1
2. Key Information 2
3. Funding Overview 2
4. Eligibility Requirements 3
   - Eligible Applicants 3
   - Eligible Projects 4
   - Eligible Expenses 5
5. General Program Requirements 5
6. Project Review and Evaluation 6
   - Project Nominations 6
   - Regional Project Review 7
   - Program Approval 7
7. Post-Selection Process Roles and Responsibilities 7
8. Schedule 8

1. Overview

The Community-Based Transportation Plan Project Development Technical Assistance (CBTP TA) Program, which is part of MTC's Community Action Resource and Empowerment (CARE) Program, will provide funding to advance transportation projects from Community-Based Transportation Plans (CBTPs), participatory budgeting (PB) processes, or other substantive community-driven planning efforts. The program seeks to strengthen the pipeline between planning and implementation by supporting activities that move community-prioritized concepts from early-stage development toward design and construction readiness. This call for projects is specifically focused on taking project concepts through to final design, along with related outreach, so that they are ready to move to construction.

This program builds directly on the long-standing CBTP Program. Established in 2002, CBTPs are community-driven plans funded by MTC and administered by County Transportation Agencies (CTAs). These plans emphasize robust engagement with residents of Equity Priority

Communities[1] (EPCs) with the goal of identifying transportation needs and recommending improvements that reflect local priorities. Over more than two decades, CBTP efforts have generated a wide range of mobility solutions and community-identified project concepts across EPCs, some of which have been implemented through MTC-funded PB pilots in San Francisco's Bayview and Solano's Vallejo alongside their CBTP activities.

The broader CARE Program continues to bridge PB and CBTP through its Participatory Budgeting and ~~Project Delivery~~ Implementation (PBI~~-PD~~)[2] component, which focuses on delivering community-identified transportation projects. While PBI~~-PD~~ operates independently, it may generate a pool of community-prioritized concepts that can be further advanced and designed through the CBTP TA Program. Projects that have reached 100% design through CBTP TA may also be eligible for PBI~~-PD~~ funding to support construction.

By aligning planning outcomes with project development and implementation pathways, the CBTP TA Program helps advance community priorities identified in CBTPs. These outcomes include, but are not limited to, enhanced active transportation options, improved transit access, and strengthened multimodal connectivity, addressing persistent mobility barriers experienced by historically underserved populations across the Bay Area.

2. Key Information

This program is administered by MTC in partnership with CTAs. While MTC oversees the overall process and reviews final project selections, CTAs are responsible for managing the project nomination process. This process may be coordinated with the fourth round of the One Bay Area Grant (OBAG 4) County Program Call for Projects or conducted through an alternative approach, subject to MTC staff approval.

Project nomination lists must be submitted to MTC by October 31, 2026[3], in alignment with the OBAG 4 County Program deadline, unless an alternative project nomination approach and timeline are approved by MTC staff.

For questions, contact Janica Mendillo at jmendillo@bayareametro.gov.

3. Funding Overview

$12 million in non-federal funds will be distributed among the nine Bay Area counties for the CBTP TA Program. Each county will receive 30 percent of available funds as a base allocation, with the remaining 70 percent distributed based on the county's share of the region's

[1] Equity Priority Communities are census tracts that have a significant concentration of underserved populations, such as households with low incomes and people of color. A combination of additional factors helps define these areas. For more information, please visit MTC's website.

[2] The CARE PBI~~-PD~~ component is under development. Additional program details will be shared later in 2026.

[3] Submittal deadline will be aligned with any future OBAG 4 guidance.

low-income population, defined as households earning below 200 percent of the federal poverty level.

CTAs shall nominate projects consistent with their assigned funding targets. At their discretion, CTAs may adjust their CBTP TA funding amount by up to +/- 30 percent, with any adjustment reflected as an equal and opposite change to their PBI ~~PD~~ funding targets. For example, if a CTA requires less funding for CBTP TA, their PBI ~~PD~~ budget will be increased by an amount equal to the reduction in CBTP TA. County-specific funding targets, along with the corresponding 30 percent maximum flexible funding available for CBTP TA, are presented in the table below.

Nominated projects must meet the $250,000 minimum project amount threshold.

Please note that this program cannot fund any post-award cost increases. Project sponsors will be expected to deliver the approved project scope within the awarded funding amount.

County	CTA	Total Funding	Flexible Funding
Alameda	Alameda County Transportation Commission	$2,379,000	+/- $713,700
Contra Costa	Contra Costa Transportation Authority	$1,692,000	+/- $507,600
Marin	Transportation Authority of Marin	$668,000	+/- $200,400
Napa	Napa Valley Transportation Authority	$562,000	+/- $168,600
San Francisco	San Francisco County Transportation Authority	$1,456,000	+/- $436,800
San Mateo	City/County Association of Governments of San Mateo County	$1,095,000	+/- $328,500
Santa Clara	Santa Clara Valley Transportation Authority	$2,110,000	+/- $633,000
Solano	Solano Transportation Authority	$1,044,000	+/- $313,200
Sonoma	Sonoma County Transportation Authority	$994,000	+/- $298,200
	Total	***$12,000,000***	***+/- $3,600,000***

4. Eligibility Requirements

Eligible Applicants

Bay Area cities, counties, transit agencies, federally recognized Tribal governments, and CTAs are eligible to apply for CBTP TA funds.

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

Eligible Projects

To qualify for funding, projects must meet the following criteria:

- Consist of capital transportation improvements, as defined in MTC Resolution No. 4740 under Complete Streets and Community Choice. Operational studies may be eligible for funding, subject to MTC review.
- Located within an EPC. If a project is not physically located within an eligible geography but is designed to serve the intended beneficiaries of the program, such as older adults, people with low incomes, people with disabilities and communities of color, the project sponsor must clearly demonstrate a nexus between the project location and the community served. Visit the interactive web map for EPC locations.
- Originate from a CBTP, MTC-funded PB[4], a locally led PB process[5], or a comparable community-driven planning effort that includes community voting or project prioritization.
- Provide clear and verifiable evidence of current community support, particularly from historically underserved populations and organizations representing these communities.

The required documentation varies based on the project's origin and the recency of the engagement process:

- **Projects originating from a PB process completed in 2022 or later** must include the originating planning or engagement document and do not require supplemental documentation.
- **Projects originating from a PB process completed in 2021 or earlier** must include the originating planning or engagement document and at least one additional form of supplemental documentation.
- **Projects not generated by a PB process** must include the originating planning or engagement document and at least one supplemental documentation item, depending on the age of the originating plan:
    - **CBTPs or other community-driven plans from 2022 or later:** At least one type of supplemental documentation demonstrating current community support is required.
    - **CBTPs or other community-driven plans from 2021 or earlier:** At least two types of supplemental documentation demonstrating current community support are required.

Projects that do not meet the minimum documentation requirements will be deemed ineligible.

Applicants may submit any of the following forms of supplemental documentation:

[4] MTC funded participatory budgeting pilots in 2018 through the Bayview and Vallejo CBTPs.

[5] Examples of participatory budgeting efforts include Marin County, the City of Oakland, and San Francisco's District 7.

- **Letters of Support**: Minimum of three letters from separate community-based organizations (CBOs), non-profit organizations, or local elected officials.
- **Collective Petitions or Sign-On Letters**: At least ten signatures from trusted organizations broadly representing the community (e.g., CBOs, non-profits, Parent Teacher Organizations, food banks, faith-based groups).
- **Formal Endorsements**: Minimum of two official endorsements from community councils, boards, commissions, or advisory committees (e.g., Bicycle and Pedestrian Advisory Committee, Equity Advisory Committee).
- **Community Prioritization Workshops**: Documentation showing that CTAs, city staff, CBOs, and members of the public participated in reviewing and prioritizing candidate projects.
- **Engagement Reports or Completed Plans**: Reports or plans with documented engagement may be submitted in combination with other types of documentation to strengthen evidence of community support.

Eligible Expenses

Eligible activities include:

- Early- to final-stage project development activities, including project initiation and scoping, environmental review and approval, and preliminary engineering needed to advance a project toward final design and implementation.
- Outreach activities to gather input for the design and/or to show the updated design to the public and stakeholders.

Project sponsors will be responsible for selecting their own consultants to carry out project development activities as listed above. Sponsors may choose to utilize MTC's on-call Design Services consultant bench to support their work.

5. General Program Requirements

The following general MTC programming requirements apply to the project nomination process.

- **Public Involvement.** MTC is committed to a public involvement process that is proactive and provides opportunities for continuing involvement, comprehensive information, timely public notice, and public access to key decisions. MTC provides many methods to fulfill this commitment, as outlined in the MTC Public Participation Plan. Additional details on CTA public involvement requirements for a call for projects are available in the OBAG 4 project selection and programming policies (MTC Resolution No. 4740).
- **Adherence to MTC's Complete Streets Policy (MTC Resolution No. 4493).** Sponsors must comply with MTC's Complete Streets Policy, and its successor, including the requirements to submit a Complete Streets Checklist and solicit input from a local Bicycle and Pedestrian Advisory Committee for each applicable project. The Complete Streets Checklist is only required for projects seeking $250,000 or more in CARE funds.

- **Adherence to MTC's Bay Area Transit Priority Policy for Roadways (MTC Resolution No. 4739).** Sponsors must comply with MTC's Bay Area Transit Priority Policy for Roadways (TPPR), and any updates or successor policies. TPPR transit agency review requirements are incorporated into the updated Complete Streets Checklist online portal. Once the regional Transit Priority Network (TPN) is adopted (anticipated no sooner than early 2027), projects along the TPN should incorporate reasonable best-practice transit-supportive design elements. TPPR transit agency review is only required for projects seeking $250,000 or more in CARE funds.

6. Project Review and Evaluation

CTAs, in coordination with MTC, will nominate projects, evaluate projects for program eligibility, and score and/or rank projects. CTAs will develop evaluation materials, deadlines, and procedures for their project nomination process. At minimum, CTAs must incorporate the following regional criteria into their project evaluations:

- **Eligibility**: CTAs should review projects and potential sponsors for eligibility.
- **Alignment**: CTAs should evaluate projects for alignment with relevant regional plans and policies. Additional weight should be given to projects that demonstrate consistency with one or more of the following regional plans and policies:
    - Current iteration of Plan Bay Area at the time of submittal to MTC
    - Coordinated Public Transit-Human Services Transportation Plan
    - Regional Safety/Vision Zero Policy (MTC Resolution No. 4400)
    - Equity Platform
- **Level of Community Support:** CTAs should evaluate projects based on the demonstrated level of community support. Beyond meeting eligibility requirements, additional consideration should be given to projects that include support letters and other documentation, as described above, that reflect meaningful community endorsement.
- **Scope**: CTAs should assess projects based on scope, prioritizing those that aim to advance project concepts to 100% PS&E.
- **Deliverability**: CTAs must evaluate projects for potential deliverability issues, deprioritizing or excluding projects as needed based on risk. CTAs should ensure that potential projects sponsors have sufficient capacity and technical expertise to complete projects in accordance with MTC's Regional Project Delivery Policy and meet expenditure deadlines, which will be developed as part of the funding agreement process.

CTA project evaluation criteria must be approved by both MTC staff and the CTA's governing board prior to initiating the project nomination process.

Project Nominations

CTAs will submit project nominations, evaluations, and associated documentation to MTC for review. CTAs coordinating project nominations with the OBAG 4 County Program Call for

Projects process are encouraged to submit CBTP TA nominations with their OBAG 4 County Program project nominations as part of a single, integrated nomination packet. Nomination lists must be approved by the CTA's governing board prior to submission to MTC. CTA project nomination packets are due to MTC by October 31, 2026[3], unless an alternative project nomination approach and timeline are approved by MTC staff. Regardless of the project nomination approach used, CTA project nomination packets must include the following elements:

- **Nomination List**: list of eligible projects for the CBTP TA Program, ranked or scored according to the evaluation criteria developed by the CTA and approved by MTC staff. The list must include the CTA's final funding recommendations as well as projects that were considered but not recommended for funding.
- **Scoring Documentation:** supporting materials, such as project scoring sheets, demonstrating that project selection was conducted in accordance with adopted criteria and procedures, with consistent and equal consideration of all projects.
- **Board Approval**: signed resolution documenting CTA governing board action approving the project nomination list.
- **Community Support Documentation**: materials verifying project eligibility as described above.

Regional Project Review

Using the nomination packets submitted by CTAs, MTC CARE staff will review documentation to ensure CTA, sponsor and project compliance with applicable policies for the CBTP TA Program. Any issues identified will be communicated to CTA staff, and projects with unresolved issues will be excluded from further consideration.

Using this process, MTC staff will develop a draft program of recommended projects for Commission adoption. MTC staff will coordinate with CTA staff to provide comments and feedback on the draft program of projects and may refine the recommended program of projects accordingly.

Program Approval

Staff plan to recommend CBTP TA projects to the Commission for award in early 2027.

7. Post-Selection Process Roles and Responsibilities

Following program approval, each CTA will complete a Funding Agreement with MTC. The Funding Agreement would include each agency's approved list of projects and each project's associated tasks.

Each CTA or project sponsor will be responsible for selecting consultants to conduct project development activities and may choose to consider consultants from MTC's on-call Design Services consultant bench.

8. Schedule

The following schedule is coordinated with the OBAG 4 County Program.

Milestone	Date*
Call for Projects Release	February 2026
Project Nomination List Deadline	October 31, 2026[6]
MTC Review of Nominations	November 2026
MTC Committee Approval	Anticipated Early 2027
Funding Agreement Execution	Anticipated Spring 2027

**All dates are subject to change.*

[6] Submittal deadline will be aligned with any future OBAG 4 guidance, unless an alternative project nomination approach and timeline are approved by MTC staff.

Appendix 4
CARE Program Cycle 1
Participatory Budgeting and Implementation (PBI) Program Guidelines

Contents

1. Overview 2
2. Key Information 3
3. Funding Overview 3
4. Eligibility Requirements 5
   - Eligible Applicants 5
   - Eligible Projects – Implementation Funds 5
   - Eligible Projects – Participatory Budgeting Funds 7
   - Eligible Projects – Community-Based Transportation Plans 7
   - Eligible Expenses 7
5. General Program Requirements 7
6. Project Review and Evaluation – Implementation Funds 8
   - Project Nominations 9
   - Regional Project Review 9
   - Program Approval 9
7. Project Review and Evaluation – CBTP Planning and Participatory Budgeting Funds 10
   - Project Nominations for Participatory Budgeting Processes 10
   - Regional Project Review 10
   - Program Approval 10
8. Post-Selection Process Roles and Responsibilities 11
9. Schedule 11

1. Overview

The Participatory Budgeting and Implementation (PBI) Program, which is part of MTC's Community Action Resource and Empowerment (CARE) Program, will provide funding for three primary buckets of projects:

1. Implementation of projects from Community-Based Transportation Plans (CBTPs), participatory budgeting (PB) processes, or other substantive community-driven planning efforts
2. Development of CBTP plans
3. Implementation of PB processes

PB is a process through which community-selected needs and priorities align with investment decisions. Traditional PB is multi-stepped and involves a steering committee of community representatives. Residents are involved in developing project ideas and voting for priorities and local jurisdictions implement "winning" projects. CARE's PBI Program builds directly on PB pilot projects funded through CARE's predecessor program, Lifeline Cycle 5 in 2018, which constructed community priorities from the Bayview community in San Francisco and the City of Vallejo, such as increased bus service, bus shelters, crosswalks, and wayfinding. The program now seeks to expand these pilot efforts and incorporate lessons learned as part of the CARE program.

This program also builds directly on the long-standing CBTP Program. Established in 2002, CBTPs are community-driven plans funded by MTC and administered by County Transportation Agencies (CTAs). These plans emphasize robust engagement with residents of Equity Priority Communities[1] (EPCs) with the goal of identifying transportation needs and recommending improvements that reflect local priorities. Over more than two decades, CBTP efforts have generated a wide range of mobility solutions and community-identified project concepts across EPCs, some of which have been implemented through MTC-funded PB pilots in San Francisco's Bayview and Solano's Vallejo alongside their CBTP activities.

Building on these prior efforts, the PBI Program is intended to strengthen the pipeline between community-driven planning and project implementation, helping to realize the full objectives of the broader CARE Program. The Power-Building and Engagement (Pb&E) component focuses on building community capacity and strengthening partnerships to support meaningful civic engagement; the CBTP Technical Assistance (TA) component advances community-identified projects from planning to construction-ready status; and the PBI component provides the resources needed to deliver those projects.

By aligning planning outcomes with project development and implementation pathways, the CARE Program helps advance community priorities identified in CBTPs and supports communities in identifying additional high priority projects. Program outcomes include, but are

[1] Equity Priority Communities are census tracts that have a significant concentration of underserved populations, such as households with low incomes and people of color. A combination of additional factors helps define these areas. For more information, please visit MTC's website.

not limited to, enhanced active transportation options, improved transit access, and strengthened multimodal connectivity, addressing persistent mobility barriers experienced by historically underserved populations across the Bay Area.

2. Key Information

This program is administered by MTC in partnership with CTAs. While MTC oversees the overall process and reviews final project selections, CTAs are responsible for managing the project nomination process and determining an allocation of flexible funds. The program seeks to provide flexibility for CTAs to balance funding for planning and implementation based on community needs and priorities at each CTA's discretion.

Considering the flexible use of funding between CBTP planning and implementation, project nomination and implementation timelines will be phased. Each CTA will be required to report their desired breakdown of funding between CBTP planning and implementation to MTC along with their implementation project nominations. The program will include a small funding set-aside of $400,000 to support PB processes in the region If CTAs are interested in opting in for a portion of the set aside for a PB process, they should submit their PB process implementation plan and budget to MTC by July 1, 2026 for consideration. If CTAs require an alternative timeline, they should also submit this request to MTC for consideration by July 1, 2026.

MTC will accept project nominations for implementation projects in two phases. The first project nomination deadline will be October 31, 2026. Phase 1 is coordinated with the fourth round of the One Bay Area Grant (OBAG 4) County Program Call for Projects and the CBTP TA Program nomination deadline. The second project nomination deadline will be June 30, 2027. These implementation project nomination deadlines also serve as the deadlines for CTAs to submit their desired amount of funding for CBTP planning.

Please note that CBTP Program Guidelines are not included in this document. The opportunity to opt into funding amounts across CBTP planning, PB processes, and implementation is intended to give CTAs as much flexibility as possible for project prioritization. Specific guidelines for the CBTP program are forthcoming.

For questions, contact Kate Fosburgh at kfosburgh@bayareametro.gov.

3. Funding Overview

$12 million in non-federal and federal[2] funds will be distributed among the nine Bay Area counties for the PBI Program. Each county will receive 30 percent of available funds as a base allocation, with the remaining 70 percent distributed based on the county's share of the region's low-income population, defined as households earning below 200 percent of the

[2] Federal funds through OBAG 4 will be used for planning only, not construction projects.

federal poverty level. An additional $400,000 will be made available specifically for PB processes on an opt-in basis.

Of this $12M, CTAs will be eligible to opt in to spend up to $2M for CBTP planning. Each county has a maximum allocation of CBTP planning eligible funding following the above formula. MTC strongly encourages each CTA to set aside sufficient funding to complete at least one CBTP in order to ensure a continued pipeline of relevant projects. If a CTA opts to not dedicate any funding to CBTP planning, the CTA must submit to MTC their rationale for doing so.

CTAs shall nominate projects consistent with their assigned funding targets. At their discretion, CTAs have the option to adjust their CBTP TA funding amount by up to +/- 30 percent, with any adjustment reflected as an equal and opposite change to their PBI funding targets. For example, if a CTA requires less funding for CBTP TA, their PBI budget will be increased by an amount equal to the reduction in CBTP TA. The +/- 30 percent funding amount will add to or be removed from implementation funding.

CTAs allocated less than $200,000 in CBTP planning funds may flex CBTP TA funds to supplement their allocation, in order to reach a maximum of $200,000 total available for CBTP planning. Otherwise, the maximum CBTP planning allotments may not be flexed. County-specific funding targets, along with the corresponding 30 percent maximum flexible funding available for PBI, are presented in the table below.

Nominated capital transportation improvement projects must meet the $50,000 minimum project amount threshold. Project nominations may include bundled projects to reach the minimum threshold, such as bus stop improvements at multiple locations within a community.

Please note that this program cannot fund any post-award cost increases. Project sponsors will be expected to deliver the approved project scope within the awarded funding amount.

County	CTA	Total Funding	CBTP Planning Maximum*	30% Flexible Funding (CBTP-TA or PBI)
Alameda	Alameda County Transportation Commission	$2,379,000	$396,000	+/- $713,700
Contra Costa	Contra Costa Transportation Authority	$1,692,000	$282,000	+/- $507,600
Marin	Transportation Authority of Marin	$668,000	$111,000	+/- $200,400
Napa	Napa Valley Transportation Authority	$562,000	$94,000	+/- $168,600
San Francisco	San Francisco County Transportation Authority	$1,456,000	$243,000	+/- $436,800
San Mateo	City/County Association of Governments of San Mateo County	$1,095,000	$182,000	+/- $328,500

Santa Clara	Santa Clara Valley Transportation Authority	$2,110,000	$352,000	+/- $633,000
Solano	Solano Transportation Authority	$1,044,000	$174,000	+/- $313,200
Sonoma	Sonoma County Transportation Authority	$994,000	$166,000	+/- $298,200
Opt-In: Participatory Budgeting Process		$400,000	N/A	N/A
	Total	*$12,400,000*	*$2,000,000*	*$3,600,000*

* CBTP Planning Maximum funds are included within Total Funding and do not add to the total funding available. Counties with a CBTP Planning Maximum of less than $200,000 may use a portion of their 30% Flexible Funding to increase their CBTP Planning Maximum to $200,000.

4. Eligibility Requirements

Eligible Applicants

Bay Area cities, counties, transit agencies, federally recognized Tribal governments, and CTAs are eligible to apply for PBI funds.

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

Eligible Projects – Implementation Funds

To qualify for project delivery funding, projects must meet the following criteria:

- Consist of capital transportation improvements, as defined in MTC Resolution No. 4740 under Complete Streets and Community Choice. Operational investments may be eligible for funding, subject to MTC review.
- Located within an EPC. If a project is not physically located within an eligible geography but is designed to serve the intended beneficiaries of the program, such as older adults, people with low incomes, people with disabilities and communities of color, the project sponsor must clearly demonstrate a nexus between the project location and the community served. Visit the interactive web map for EPC locations.
- Originate from a CBTP, MTC-funded PB[3], a locally led PB process[4], or a comparable community-driven planning effort that includes community voting or project prioritization.
- Provide clear and verifiable evidence of current community support, particularly from historically underserved populations and organizations representing these communities.
- Have full funding secured, through this program alone or including others, for implementation.

[3] MTC-funded participatory budgeting pilots in 2018 through the Bayview and Vallejo CBTPs.

[4] Examples of participatory budgeting efforts include Marin County, the City of Oakland, and San Francisco's District 7.

- Be construction ready at the time of nomination, or in the case of a project planned for CBTP TA funding, by the conclusion of CBTP TA activities.

The required documentation varies based on the project's origin and the recency of the engagement process:

- **Projects originating from a PB process completed in 2022 or later** must include the originating planning or engagement document and do not require supplemental documentation.
- **Projects originating from a PB process completed in 2021 or earlier** must include the originating planning or engagement document and at least one additional form of supplemental documentation.
- **Projects not generated by a PB process** must include the originating planning or engagement document and at least one supplemental documentation item, depending on the age of the originating plan:
    - **CBTPs or other community-driven plans from 2022 or later:** At least one type of supplemental documentation demonstrating current community support is required.
    - **CBTPs or other community-driven plans from 2021 or earlier:** At least two types of supplemental documentation demonstrating current community support are required.

Projects that do not meet the minimum documentation requirements will be deemed ineligible.

Applicants may submit any of the following forms of required supplemental documentation:

- **Letters of Support**: Minimum of three letters from separate community-based organizations (CBOs), non-profit organizations, or local elected officials.
- **Collective Petitions or Sign-On Letters**: At least ten signatures from trusted organizations broadly representing the community (e.g., CBOs, non-profits, Parent Teacher Organizations, food banks, faith-based groups).
- **Formal Endorsements**: Minimum of two official endorsements from community councils, boards, commissions, or advisory committees (e.g., Bicycle and Pedestrian Advisory Committee, Equity Advisory Committee).
- **Community Prioritization Workshops**: Documentation showing that CTAs, city staff, CBOs, and members of the public participated in reviewing and prioritizing candidate projects.
- **Engagement Reports or Completed Plans**: Reports or plans with documented engagement may be submitted in combination with other types of documentation to strengthen evidence of community support.

In the case that a CTA applies to fund a project through both CBTP TA through PBI:

- The criteria above are the same as the criteria within the CBTP TA Guidelines. Therefore, there is no need to resubmit proof of the above requirements.

- In this case, if the project will advance to construction readiness through participation in the CBTP TA program, the project does not need to be construction ready to be awarded funding for construction through PBI.
- The CTA acknowledges responsibility to complete implementation as described in the application, including identifying additional funding to cover any costs exceeding the amount applied for and awarded.

Eligible Projects – Participatory Budgeting Funds

To qualify for funding to support PB process, projects must meet the following criteria:

- Have identified a framework for conducting the PB process
- Must meet, at a minimum, the engagement requirements identified above

Eligible Projects – Community-Based Transportation Plans

MTC anticipates issuing guidance for CBTPs in Summer 2026.

Eligible Expenses

Eligible activities include:

- Construction of eligible projects
- PB process to identify eligible priority projects
    - Staff salaries are not an eligible expense for the PB process set-aside
    - Eligible expenses include stipends, materials, venue rentals, and contracts with consultants or CBOs
- CBTP planning
    - Eligible expenses for CBTP planning will be detailed in updated CBTP Program Guidelines planned for adoption in Summer 2026

Project sponsors will be responsible for selecting their own consultants to carry out project development activities as listed above. Sponsors may choose to utilize MTC's on-call Construction Management consultant bench to support their work.

5. General Program Requirements

The following general MTC programming requirements apply to the project nomination process.

- **Public Involvement.** MTC is committed to a public involvement process that is proactive and provides opportunities for continuing involvement, comprehensive information, timely public notice, and public access to key decisions. MTC provides many methods to fulfill this commitment, as outlined in the MTC Public Participation Plan. Additional details on CTA public involvement requirements for a call for projects are available in the OBAG 4 project selection and programming policies (MTC Resolution No. 4740).
- **Adherence to MTC's Complete Streets Policy (MTC Resolution No. 4493).** Sponsors must comply with MTC's Complete Streets Policy, and its successor, including the

requirements to submit a Complete Streets Checklist and solicit input from a local Bicycle and Pedestrian Advisory Committee for each applicable project. The Complete Streets Checklist is only required for projects seeking $250,000 or more in CARE funds.

- **Adherence to MTC's Bay Area Transit Priority Policy for Roadways (MTC Resolution No. 4739).** Sponsors must comply with MTC's Bay Area Transit Priority Policy for Roadways (TPPR), and any updates or successor policies. TPPR transit agency review requirements are incorporated into the updated Complete Streets Checklist online portal. Once the regional Transit Priority Network (TPN) is adopted (anticipated no sooner than early 2027), projects along the TPN should incorporate reasonable best-practice transit-supportive design elements. TPPR transit agency review is only required for projects seeking $250,000 or more in CARE funds.

6. Project Review and Evaluation – Implementation Funds

CTAs, in coordination with MTC, will nominate implementation projects, evaluate projects for program eligibility, and score and/or rank projects. CTAs will develop evaluation materials, deadlines, and procedures for their project nomination process. At minimum, CTAs must incorporate the following regional criteria into their project evaluations:

- **Eligibility**: CTAs should review projects and potential sponsors for eligibility.
- **Alignment**: CTAs should evaluate projects for alignment with relevant regional plans and policies. Additional weight should be given to projects that demonstrate consistency with one or more of the following regional plans and policies:
    - Current iteration of Plan Bay Area at the time of submittal to MTC
    - Coordinated Public Transit-Human Services Transportation Plan
    - Regional Safety/Vision Zero Policy (MTC Resolution No. 4400)
    - Equity Platform
- **Level of Community Support:** CTAs should evaluate projects based on the demonstrated level of community support. Beyond meeting eligibility requirements, additional consideration should be given to projects that include support letters and other documentation, as described above, that reflect meaningful community endorsement.
- **Scope**: CTAs should assess projects based on scope, prioritizing construction ready, community driven projects for implementation, or plans that prioritize engagement in a new, robust PB process to identify priority projects.
- **Deliverability**: CTAs must evaluate projects for potential deliverability issues, deprioritizing or excluding projects as needed based on risk. CTAs should ensure that potential projects sponsors have sufficient capacity and technical expertise to complete projects in accordance with MTC's Regional Project Delivery Policy and meet expenditure deadlines, which will be developed as part of the funding agreement process.

CTA project evaluation criteria must be approved by both MTC staff and the CTA's governing board prior to initiating the project nomination process.

Project Nominations

CTAs will submit project nominations, evaluations, and associated documentation to MTC for review. CTAs have been encouraged to coordinate project nominations for CBTP TA with the OBAG 4 County Program Call for Projects as part of a single, integrated nomination packet due October 31, 2026. The Phase 1 deadline for PBI project nominations is October 31, 2026, to align with CBTP TA and OBAG 4 Call for Projects.

CTAs opting into a PB process or that otherwise need more time for project nominations may wait for the Phase 2 deadline of June 30, 2027. Any alternative project nomination approach and timeline must be approved by MTC staff. Nomination lists must be approved by the CTA's governing board prior to submission to MTC. Regardless of the project nomination approach used, CTA project nomination packets must include the following elements:

- **Nomination List**: list of eligible projects for the PBI Program, ranked or scored according to the evaluation criteria developed by the CTA and approved by MTC staff. The list must include the CTA's final funding recommendations as well as projects that were considered but not recommended for funding.
- **Scoring Documentation:** supporting materials, such as project scoring sheets, demonstrating that project selection was conducted in accordance with adopted criteria and procedures, with consistent and equal consideration of all projects.
- **Board Approval**: signed resolution documenting CTA governing board action approving the project nomination list.
- **Community Support Documentation**: materials verifying project eligibility as described above.

Regional Project Review

Using the nomination packets submitted by CTAs, MTC CARE staff will review documentation to ensure CTA, sponsor and project compliance with applicable policies for the PBI Program. Any issues identified will be communicated to CTA staff, and projects with unresolved issues will be excluded from further consideration.

Using this process, MTC staff will develop a draft program of recommended projects for Commission adoption. MTC staff will coordinate with CTA staff to provide comments and feedback on the draft program of projects and may refine the recommended program of projects accordingly.

Program Approval

Staff plan to recommend PBI projects in the Implementation category to the Commission for award in Early 2027 for Phase 1, and Fall 2027 for Phase 2.

7. Project Review and Evaluation – CBTP Planning and Participatory Budgeting Funds

CTAs will determine the total amount of PBI funding for CBTP planning at the time of their chosen project nomination deadline, and will retain discretion over which communities participate in a CBTP planning process.

CTAs also have the option to opt in to receive funding from the PB set-aside. MTC will review CTA's PB process plans and award funds to projects that satisfy the conditions below.

Project Nominations for Participatory Budgeting Processes

CTAs will submit plans for Participatory Budgeting processes to MTC for review. CTAs should identify the following as part of their plans for use of PB funds:

- **PB Process Goals and Approach:** discussion of the CTA's goals for the PB process and the proposed approach for conducting the PB process, including any partnerships with community-based organizations, timeline for holding the PB outreach, and whether the process would be consultant-led or staff-led.
- **Community Summary**: description of the geographic area where PB process would be centered, including a summary of any overlap with EPCs or other relevant demographic or socioeconomic data that aligns with the EPC description.
- **Engagement Plan and Partner Organizations:** description of the CTA's plan to engage with the community before, during, and after the PB process, including any community-based organizations or peer implementing agencies (e.g., Departments of Public Works, transit agencies) that would partner in the effort.
- **Commitment to PB:** board resolution or signed letter from CTA executive director affirming the CTA's commitment to make a good-faith effort to submit eligible projects prioritized through the PB process for PBI implementation funds.
- **Prior Planning Efforts**: inventory of past planning efforts that have taken place in the community where PB is proposed, dating back at least to 2022.
- **Funding Request**: total funding requested to complete the PB process.

Regional Project Review

Using the nomination packets submitted by CTAs, MTC CARE staff will review documentation to ensure CTA, sponsor and project compliance with applicable policies for the PB set-aside. Any issues identified will be communicated to CTA staff, and projects with unresolved issues will be excluded from further consideration.

Using this process, MTC staff will develop a draft program of recommended PB process awards for Commission adoption.

Program Approval

Staff plan to recommend PB funds to the Commission for award in August 2026 and CBTP planning funds to the Commission for award in Early 2027 or Fall 2027, following the two-phased approach.

8. Post-Selection Process Roles and Responsibilities

Following program approval, each CTA will complete a Funding Agreement with MTC. The Funding Agreement would include each agency's approved list of projects and each project's associated tasks as well as CTA reporting requirements. If a CTA already has a funding agreement for the CBTP TA program, an amendment to the existing agreement with additional funding and associated requirements for PBI may be acceptable.

CTAs will be responsible for working with sponsors to develop a project scope of work, schedule, and budget. The scope of work must include a task to prepare a Project Evaluation Report, which will include reporting metrics and required data collection to measure project effectiveness. The Project Evaluation Report should be submitted within one year of project completion.

Projects must adhere to project delivery milestones, invoice deadlines, and funding expiration deadlines. Funding expiration dates are set by MTC. Should priorities or conditions change, or if a project is not ready to advance, funds may be reassigned to another project.

9. Schedule

Milestone	Date*
Begin Project Nomination List Development	May 2026
PB Request Deadline	July 1, 2026
MTC Committee Approval: PB Funding Approval	August 2026
CBTP Planning Request & Implementation Project Nomination List Deadline: Phase 1	October 31, 2026
MTC Review of Implementation Project Nominations: Phase 1	November 2026
MTC Committee Approval: Phase 1 Implementation Projects & CBTP Planning Funding	Anticipated Early 2027
CBTP Planning Request & Implementation Project Nomination List Deadline: Phase 2	June 30, 2027
MTC Review of Implementation Project Nominations: Phase 2	July 2027
MTC Committee Approval: Phase 2 Implementation Projects & CBTP Planning Funding	Anticipated Fall 2027
Funding Agreement Execution	May vary by county based on phased approach

**All dates are subject to change.*