



BOARD OF DIRECTORS

Jim Coulter, CLPF, *President*
Christine Winge, *Vice President*
Gabriel Torres, *Treasurer*
Tina Del Piero, CFRE, *Secretary*
Karen Boothroyd
Mary Brusuelas
Galen Call
Arlene Dedini
Susan Gibbons
Vearl Gish

January 16, 2020

Transportation Agency for Monterey County
Measure X Senior & Disabled Transportation Program
55-B Plaza Circle
Salinas, CA 93901

Dear Review Committee,

The Alliance on Aging (AOA) welcomes the opportunity to submit this proposal to TAMC for funding for the enclosed *Senior & Disabled Transportation Coordination Project*. The proposed project builds on the success of our transportation coordination program funded in Cycle 1, maintain existing services while deepening our reach into both the South and North County regions.

EXECUTIVE DIRECTOR

Teresa Sullivan

DIRECTOR OF PROGRAMS

Becky Mann

FINANCE DIRECTOR

John Assaad

**MARKETING & DEVELOPMENT
DIRECTOR**

Wanda Pan Christiansen

PROGRAMS

Community Outreach & Education
Medicare Information & Counseling
(HICAP)
Nursing Home Information &
Advocacy (OMBUDSMAN)
Senior Peer Counseling
Tax Counseling for the Elderly
Benefits Checkup

As the enclosed narrative will illustrate, we achieved our original goals of hiring a Senior Transportation Specialist who would provide information, training and hands-on support to seniors and expanding our current partnerships with transportation providers. During Cycle 1, we achieved good success in Salinas, where there exists a robust set of transportation options and demand for services was high. We learned that limited transportation services in South County and to a lesser degree in North County, have contributed to an inability to provide as meaningful a program there. Therefore, the attached proposal increases the budget to include both more staffing to build services in other county communities. AOA proposes to grow our transportation services by acting as a “convener” to advocate for additional transportation resources, bringing together city officials, local providers and potential senior/disabled consumers; and by expanding individual assessment and other personalized services to senior/disabled program participants.

This year, Alliance on Aging celebrates 50 years of support services to seniors in Monterey County. From its inception, AOA’s goal has been to provide services that help seniors maintain their optimum independence and quality of life. Access to transportation for seniors is a key component in achieving that goal. We look forward to working with TAMC to ensure access to quality transportation services.

Please do not hesitate to contact me if you have any questions regarding this proposal. (831-655-4240)

Sincerely,

Teresa Sullivan
Executive Director



280 Dickman Avenue
Monterey, CA 93940
831-646-1458 Phone
831-646-1232 Fax



Proposal Signature Page

If selected for funding, the information contained in this application will become the foundation of the **Funding Agreement** with TAMC. To the best of my knowledge, all information contained in this application is true and correct.

Signed:

Teresa Sullivan

Print Name:

Teresa Sullivan

Title:

Executive Director

Date:

1/16/2020

Applicant Information

Implementing Organization's Name:

Alliance on Aging

Grant Amount Request:

\$287,000

Contact (name and title):

Teresa Sullivan, Executive Director

Contact Email:

tsullivan@allianceonaging.org

Contact Phone Number:

831.655.4240

If the applicant is not a 501(c)(3) organization, then the applicant must partner with an organization that is and can serve as a fiscal sponsor. The applicant must complete the following information about the fiscal sponsor.

Name of Fiscal Sponsor:

Contact (name and title):

Contact Email:

Contact Phone Number:

Tax ID #:



FISCAL YEARS 2020/21, 2021/22, AND 2022/23.

Measure X Senior & Disabled Transportation Program

Program Application

Required Contents

Applications are due via email to Stefania Castillo, program coordinator, (stefania@tamcmonterey.org) on **Thursday, January 16, 2020 at 5:00 P.M. PST.**

The application must be submitted in the format noted below and include:

- Proposal Signature Page (PDF format)
- Program Application (Word Document)
- Project Budget (Excel Spreadsheet)
- Project Timeline (Word Document)



Proposal Signature Page

If selected for funding, the information contained in this application will become the foundation of the **Funding Agreement** with TAMC. To the best of my knowledge, all information contained in this application is true and correct.

Signed: _____

Print Name: Teresa Sullivan

Title: Executive Director

Date: 1/16/2020

Applicant Information

Implementing Organization's Name: Alliance on Aging

Grant Amount Request: \$287,000

Contact (name and title): Teresa Sullivan, Executive Director

Contact Email: tsullivan@allianceonaging.org

Contact Phone Number: 831.655.4240

If the applicant is not a 501(c)(3) organization, then the applicant must partner with an organization that is and can serve as a fiscal sponsor. The applicant must complete the following information about the fiscal sponsor.

Name of Fiscal Sponsor: _____

Contact (name and title): _____

Contact Email: _____

Contact Phone Number: _____

Tax ID #: _____



Program Application

Project Title

Provide a brief project title.

Senior Transportation Coordination and Advocacy Project

Organization's History

Provide a brief description of your organization's history providing services to seniors and/or people with disabilities in Monterey County.

Celebrating 50 years of service, the Alliance on Aging (AOA) is a nonprofit (501c3) organization serving the needs of the growing number of older adults in Monterey County, with offices in both Monterey and Salinas, and outreach sites throughout the county. The AOA serves seniors and their families throughout Monterey County providing information, direct services and resources, and referrals to other senior programs *at no cost*. We help seniors obtain substantial savings on health care and medications, tax refunds, benefits and discount programs. Volunteers and staff provide those direct services, as well as information and education to seniors, adult children, caregivers and those who are approaching and preparing for their senior years. We remain dedicated to our mission as a community leader and advocate to providing services and resources that address the challenges and opportunities of aging. Our services are offered free of charge, and often provided by a team of trained and skilled volunteers and include the following:

1. The HICAP program helps people of all ages learn about Medicare benefits, compare Medicare health plans, learn about Medicare Part D, and select supplemental and/or long-term coverage. The staff and trained volunteers advocate for clients regarding Medicare claims and screen for low income assistance eligibility.
2. Our Peer Counseling program's trained volunteers provide free emotional support at clients' homes, in our offices, or in long term facilities, in both English and Spanish. These same volunteers conduct support groups and wellness lectures. A new component of the lectures, named "Fortaleciendo el Bienestar" or "Strengthening Wellness", provides a series of lectures, each in Spanish.
3. The Tax Counseling program's trained volunteers help prepare both state and federal tax returns, at various sites in Monterey County. They also help with IRS problems throughout the year. All work is confidential, and the training is done in conjunction with the IRS.
4. Our Outreach and Education provides information and referrals to senior services throughout the county. Our van and staff travel from South County to Castroville, attending events,

distributing farmer's market coupons, and counseling and referring people to all available programs.

5. The Benefits Check-up Program checks eligibility for CalFresh, Medicare "Extra Help", a home energy discount, taxi vouchers, and for free cell phone and/or discounted phone service.

6. The Ombudsman program's trained volunteers and staff investigate and resolve complaints in residential care and nursing facilities, including elder abuse. They also provide placement information and guidance to seniors and their families.

7. The Senior Transportation Specialist program, added in 2018-19, is funded almost exclusively through a grant from TAMC's Measure X Senior & Disabled Transportation grant. Since its inception, the program has made great strides in assisting seniors to understand and access available services, and plan transportation routes. This grant application, if successful, will expand this program's reach in the senior community.

Project Summary and Need (1,000 words max.)

Describe the project to be funded, including the main services provided and any expected project deliverables. Explain the transportation need that the project is addressing.

Project to be Funded

Funding requested for this project will continue the existing Senior Transportation Specialist program funded by TAMC in Cycle One and if awarded a grant in Cycle 2 funding, expand the program to:

- increase our staff to 1.5 full time equivalent (FTE) staff, consisting of the Transportation program Coordinator (1 FTE) and a Transportation Assistant (.5 FTE). (Years 1-3)
- convene meetings with mayor/community members in South County, specifically targeting Soledad, with a goal of expanding senior transportation services there. (Years 1-3)
- expand service coordination services to Prunedale, Castroville, Moss Landing, Royal Oaks (Year 2-3)

Staff increase: Approaching the end of our second year of the program, the program is close to maximizing its staff resources, which consist of one 80% full time equivalent (FTE) program Coordinator and 7% FTE Program Assistant. In the original proposal to TAMC, we anticipated the Program would expand services county-wide by Year 3 and while staff has attended many outreach events, particularly in South County cities, distributing thousands of flyers and educating people small groups, a lack of transportation services for seniors in the region has stymied the program's ability to grow. Additionally, the demand for information and services in Salinas has consumed a majority of staff time. This makes sense for 35% of the county's seniors live in Salinas, our office is

located in Salinas, and there is a robust network of transit services available to seniors in Salinas. While maintaining this level of service, we need to expand staffing in order to grow the program to other areas as listed below.

Expansion in South County: AOA’s staff and board are well-known in South County cities and trusted by seniors. Programmatically, for many years we have provided income tax assistance, Medicare insurance counseling, community outreach, health education lectures, and peer counseling. All services are provided in English and Spanish, depending upon the audience. Additionally, for the past five years, AOA has produced the “South County Trashion Show”, a lively fundraising event held at King City Fairgrounds that features modeled clothing created from recycled materials. All proceeds support AOA programs.

With a solid foundation in services and outreach, AOA proposes to grow our transportation services by acting as a “convener” to advocate for additional transportation resources in the region. At this time, we plan to focus on the City of Soledad, which, according to data in the 2019 Draft Report Senior and Disabled Needs Assessment (2019), boasts 1,393 persons age 65+, more than any other nearby city. Led by Executive Director Teresa Sullivan with the support of the Transportation Program Coordinator Maribel Trejo, we propose to meet with city officials including mayor, city council, and other key informants to commence a community-wide conversation about senior and disabled transportation needs in the city. Initial topics of discussion at the local level may include a variety of approaches to expanding and improving resources for seniors and disabled individuals.

Expand Coordination Services to Prunedale and rural north county unincorporated towns: The City of Prunedale has 2,500+ senior residents. The AOA Transportation Specialist would work in conjunction with local senior centers and other providers, to educate and assist seniors with transportation options. Additional outreach and one-to-one appointments will be attempted in the outlying communities in north county including Castroville, Royal Oaks and Moss Landing.

NOTE: Monterey Peninsula region: staff has made presentations and distributed a limited number of bus passes and taxi vouchers there but have placed this region as a low priority due to the more abundant resources, e.g., established bus routes and ITN.

Deliverables

Provide Trainings to Senior Service Providers (Ongoing 2020 -2023)

- Provide individual/group training to senior service providers county-wide
- Maintain lists of contacts & training
- Stay apprised of the evolving transportation options & maintain updated resource list, printed materials & website
- Resource list, website & materials will be accurate & current

Provide transportation information to seniors (Ongoing 2020 -2023)

- Distribute transportation information to all AOA offices and other senior-frequented venues
- Distribute transportation information at outreach events in community

- Provide training to groups or individuals on transportation options

Provide individual support to seniors (Ongoing 2020 -2023)

- Identify & meet with seniors county-wide who would benefit from individualized transportation assessment
- Provide information & make referrals to MST for Travel Training
- Provide information & assist with registration for MST Taxi Voucher Program
- Provide information & assist with registration for MST Trips program
- Distribute MST bus passes to seniors with a focus on Salinas, and South and North County regions
- Provide information & registration assistance to other providers i.e. Independent Transportation Network (ITN); Call the Car; Freedom Medical Transport; GoGo Grandparent

Advocate for increasing transportation services in South County (Begin 2020 and continue through 2023)

- Serve as the convener with South County officials & stakeholders to identify service gaps & explore viable models of transportation

Advocate for increasing transportation services in rural North County areas

- Identify service gaps & potential transportation models in Prunedale and other rural communities (Begin 2023)

Project Need

As people age, they begin to lose mobility. People who once drove everywhere find it more problematic. Monterey County, with a growing senior population, is challenged to provide transportation to meet its needs now and in the future, particularly in rural areas. The lack of awareness and access to transportation leads to increased isolation for people who are already hampered by disability and/or limited mobility. It also means that seniors are not able to access other services and resources that could help them. Many seniors are unaware of the transport options available to them, despite advertising; and, those who are not used to using public transport often find the information are complex and confusing. The Alliance on Aging has a history working with this population. We are uniquely qualified to grow and expand the existing project.

How many part-time, full-time staff and/or volunteers will be involved in implementing the proposal?

The project will employ one full time Program Coordinator and one 50% time Program Assistant. A small percentage of the AOA Program Director's time is included to ensure oversight of the activities.

Project Questions

Applicants must answer the following questions, **as applicable**. If a question does not apply to the project, indicate “not applicable” **with a brief explanation**. Do not leave blank fields. *Answers are limited to 500 words for each question.*

Program Purpose & Goals – 25 points

1. Explain how your organization currently supports the transportation needs of seniors and/or people with disabilities. (500 words max.)

The Alliance on Aging (AOA) was awarded a TAMC grant in Funding Cycle One for a “Senior Transportation Specialist Project”. The primary goal of the project from its outset was to educate seniors about their transportation options, and to increase their use of these options. Now in its second year of the grant, our program has met all four of the goals set out in our project timeline including the recruitment and training of staff, development of a comprehensive senior transportation resource list, training senior service providers on these resources, distribution of resources to seniors, and one-to-one support for seniors.

This program grew out of a need for information about the various transportation services available to seniors who are no longer able to drive or do not have the financial means to support vehicle ownership. Questions we continually fielded from seniors and/or their family members include such items as: What is ITN? Where can I get a taxi voucher? Why can't I get a taxi voucher in Greenfield? Can you help me plan a bus route from Salinas to Seaside? Is there a paratransit program in Monterey County? I can't afford to pay bus fare to get to my doctor appointment. Can you help me? While each provider of services does a good job in promoting it, there has been no central source of information about all senior transportation options until now.

We are pleased at what our Senior Transportation Specialist (STS) Program has been able to achieve in 18 months:

- ✓ Recruited and hired a .8 Transportation Specialist
- ✓ Developed a resource list of transportation services for seniors and disabled
- ✓ Attended 129 outreach events throughout the county, distributing a total of 5800 flyers about our program offerings
- ✓ Met with 130 individual seniors to assist them with transportation options and/or help plan a trip
- ✓ Trained 177 nonprofit agencies' staff and community seniors about the available services
- ✓ Distributed 428 bus passes to seniors
- ✓ Registered 162 seniors for the MST taxi vouchers

As part of a larger organization that is known and trusted by seniors and their family members, our fledgling transportation program has been able to build a solid foundation on which to grow these services. Moreover, the program has been able to “piggy-back” with other AOA programs to

maximize exposure. For example, we have a Community Outreach program, the staff of which, travels around the county to provide information and assistance to seniors about AOA and other senior services. Our professional aging staff also refer clients between programs. An individual who comes to one of our offices for a Medicare counseling or income tax appointment can easily be referred to the transportation program, and vice versa.

In an organization that individually serves over 6,000 seniors annually, there are continual opportunities for seniors to access many resources, including transportation assistance. This program has the potential to grow geographically and in number of persons served which, in turn, helps to ensure a more dynamic and viable transportation network in Monterey County.

2. Does your organization provide transportation or purchase transportation from others? Explain. (500 words max.)

N/A. This program does not provide direct transportation services; however, the program does (1) purchase bus passes for distribution to seniors/disabled persons in need, and 2) enroll seniors in the MST Taxi Voucher program in Salinas.

3. Explain how the project coordinates with, and avoids duplication of, other efforts in the county to increase (provide new or alternate) transportation services to seniors and/or people with disabilities. (500 words max.)

The program's reason for being arose from a lack of coordination of senior transportation resources. AOA's staff works closely with MST, ITN and other providers to act as an information clearing house for seniors, who often need more assistance than younger users of public transportation. However, social service networks are notoriously fragmented. Understanding which services a given agency provides and how to access them can be confusing and sometimes bureaucratic. Moreover, many seniors are not comfortable using telephone apps to access services; in fact, many low-income seniors cannot afford a cellphone.

Imagine for a moment you are a senior with a disability who can no longer drive. You have to determine how to get to the doctor's office or the grocery store. Where do you begin? If you are hard of hearing, it may be difficult to understand what is being said by phone. If you have a visual impairment, it may be impossible to read a resource directory. You've heard of paratransit but how do you find it? If you *are* able to contact each provider and learn about the offerings, you must then make a list of 'who provides what' in your neighborhood, figure cost, schedules, and so forth. A senior accessing the AOA's program can make a one-on-one appointment and be assured of meeting with an aging professional who focuses on his/her unique transportation needs. No other organization is providing this type of program. Below is an example of a typical individual appointment:

- The Senior Transportation Specialist (STS) staff meets with a senior client who drops-in to the office or makes an appointment in advance;
- The STS interviews the client, gathering important demographic information, name, address, date of birth, etc., to establish place of residency and eligibility for individual transportation services;
- The STS discusses and clarifies options available to the clients which may include but are not limited to planning bus routes, registering for the MST RIDES and taxi voucher programs, obtaining free bus passes, Call the Car, and how to access & utilize transportation apps such as Go-Go Grandparent and Lyft;
- The STS may assist the client with registration for specific services, e.g., taxi vouchers, as requested;
- The STS may provide referral contact information to the client, as requested.
- The STS provides a “one-stop shopping” location to refer client to other needed, non-transportation services at both the AOA and other senior service agencies.

Program Benefits – 30 points

4. Explain how the Measure X grant funding will increase (provide new or alternate) transportation services to:
 - a. Give seniors more transportation options. *(500 words max.)*

As noted above in the proposed project section, there is no other program – particularly within a senior services organization – that provides the education and coordination of senior/disabled transportation services. Our program educates seniors, increasing their knowledge about local transportation options and encourages their use of same. We work with local direct transportation providers and the entire transportation network to ensure the most current, accurate information is available. After a lifetime of driving for most, getting seniors to actually use the available options takes more work. We provide one-to-one training and support to seniors which includes experiential learning. Our primary work focuses on individual needs, abilities and location to match available options to the senior.

In addition to continuing with the transportation resource coordination and education components of the program and expanding these to north county rural communities, the proposed project expansion has the potential to increase transportation in South County. As detailed in the Program Purpose & Goals section of the proposal, AOA in South County, will build coalitions and partnerships with an aim to increase senior/disabled resources. Some potential areas to explore may include but are not limited to:

- Foster a working relationship between the City and MST to develop an ‘in-city’ senior/disabled van service; while MST provides “on-call” bus services only, it is difficult for seniors to use during peak hours due to student demand for rides.
- Facilitate meetings between the City and the regional taxi authority to encourage membership of current Soledad providers (two current providers) so that low cost taxi vouchers would be available to seniors and the disabled.
- CalTrans, through federal funding, provides grants for vehicles, related equipment and some operating expenses for disabled senior transportation through its Section 5310 program. Could the City apply for funds to establish its own Soledad senior/disabled transportation program?
- The AOA, with its local knowledge of the senior community will act as a liaison between city officials (or MST, taxi authority) to convene senior focus groups for purposes of evaluating local needs and desires.
- In addition to networking, convening and organizing transportation advocates, the AOA will promote MST’s “TRIPS” program, which reimburses eligible family/friends for mileage when transporting a senior/disabled individual, as well as educating seniors about other transportation apps, e.g., “Go-Go Grandparent”.
- AOA’s Transportation Program staff will promote and encourage volunteering by South County residents with the ITN program, which plans to expand services in the South County region (see attached Letter of Support)

b. Support independent travel by people with disabilities. (500 words max.)

According to the 2013-2017 American Community Survey 5-Year Estimates (Table S1810), 19.8% of Monterey County’s senior population, age 65+ has a disability.

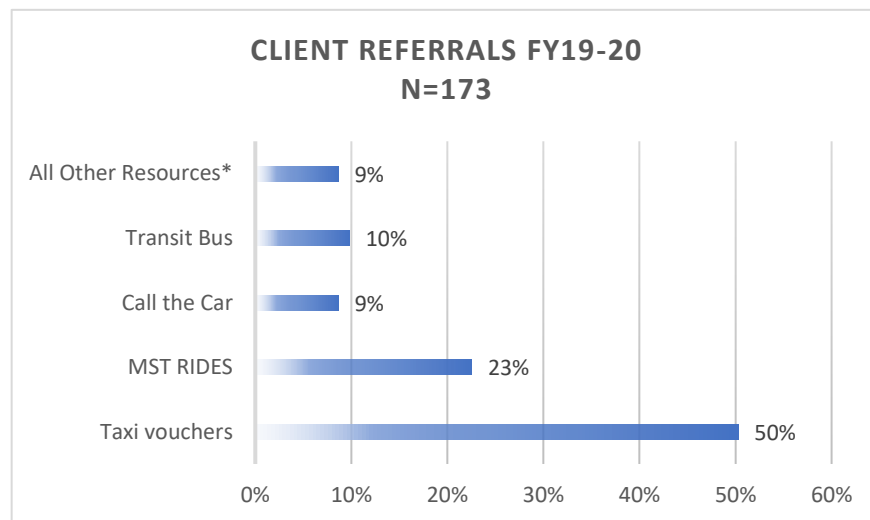
As is clearly evident from the following data collected by AOA’s Transportation Program, the percentage of our clients far exceeds this average. Data from the current fiscal year indicates:

- 53% of clients served state they have no disability, 43% have one or more disabilities, 4% declined to respond.
- Of the 43% with a disability:
 - 74% had a physical disability
 - 13% had a visual disability
 - 6% had a hearing disability
 - 6% had a mental disability
 - 5% responded “other disability”

AOA’s transportation clients this year range from age 40 (client seeking RIDES program information) to age 99 (client attending a presentation on transportation resources), with an

average age of 75. Statistically, advancing age will be accompanied by challenges that impact ability to complete functional activities of daily living, especially driving a vehicle. Therefore, we anticipate that with the expansion of the program, AOA will continue to serve a high percentage of seniors with one or more disabilities.

As we developed a database of individuals (almost exclusively in Salinas) this year who made one-to-one appointments, we have the beginnings of a user profile that, combined with disability and age statistics above, illustrates the needs and services selected by clients. The current fiscal year’s clients requested the following referrals (six-month period to date):



(Note: “Other resources” in the above chart refers to ITN, Call the Car, Gogo Grandparent, TRIPS, on-call bus service, and requests for multiple resources)

Transportation staff conducted several brief client surveys following their contact with the program. The survey was conducted as a five-point Likert Scale with the following questions and results:

1. I learned information that was new to me*:
 - a. 74% agreed or strongly agreed
 - b. 8% disagreed
 - c. 18% no response
2. I connected with others in my community:
 - a. 82% agreed or strongly agreed
 - b. 10% disagreed
 - c. 8% were neutral

3. The materials provided were helpful to me:
 - a. 95% agreed or strongly agreed
 - b. 3% disagreed
 - c. 3% were neutral
4. The facilitator provided a safe place to discuss my concerns:
 - a. 97% agreed or strongly agreed
 - b. 3% disagreed
5. I am comfortable about using public transportation:
 - a. 81% agreed or strongly agreed
 - b. 5% disagreed
 - c. 11% were neutral
 - d. 3% no response

**Differences in totals due to rounding*

The above data confirms our statement of need in both the Cycle 1 proposal and this current one: that seniors of a certain age (average 75) may have one or more disabilities that prevent them from driving, and they appreciate the assistance of an aging professional in trying to understand and find appropriate solutions for their transportation needs.

c. Provide safer and more reliable senior transportation services. (500 words max.)

Although the STS provides service coordination and not direct transportation, the program helps to ensure seniors can travel safely and reliably. Methods by which this accomplished are:

- Education
 - the STS provides public presentations to seniors, their family/friends at senior centers and residences about the options available in their region
 - the STS travels to events around the county to distribute flyers and answer questions about transportation
- Personalized Planning
 - The STS helps seniors to plan a travel route on the MST bus system so that the client can be assured of pickup and drop off points and schedules
 - The STS assists a client with an initial application to the MST RIDES program and/or register the client in the Taxi Voucher program
 - The STS provides bus passes to seniors to ensure they have access to a safe form of transportation
 - The STS distributes taxi vouchers to City of Salinas seniors
- Travel training
 - The STS is available, on request, to accompany a senior on a travel training exercise

As a long time and well-known senior service provider to many of Monterey County’s seniors, the AOA is trusted by them to provide personalized assistance to meet individual transportation needs. While many seniors learn about this program by attending a presentation, attending an outreach event, or picking up a flyer at the local senior center, any senior can obtain more individualized help by dropping-in to the office or scheduling an in-person (or telephone meeting for those who can’t travel to us) meeting that assures them of confidentiality and safety.

Feasibility – 15 points

5. Are there any actions required by other organizations to implement the proposed project? (500 words max.)

The AOA program is not a direct transportation provider; therefore, portions of the current and proposed program expansion do depend on the continued commitment of Monterey County direct transportation service providers. These include:

- Monterey Salinas Transit (MST): MST provides a wide variety of transportation services. The AOA program and proposal depends on MST continuing existing programs such as paratransit (RIDES), taxi vouchers, travel training, on-call bus in South County, and TRIPS (travel reimbursement).
- Central California Alliance for Health (CCAH): CCAH offers rides to Medi-Cal recipients through its “Call the Car” program. Nine percent of our program clients requested referral to this program in the past six months.
- Aspire Health Plan: coordinates transportation to medical appointments for its members, including South County residents.

To expand our program services as proposed, we will depend on the following organizations to act:

- ITN Monterey: AOA proposes to work with ITN as it expands services to South County by assisting with the recruitment of volunteer drivers.
- South County communities: The proposed expansion will require the cooperation of city government and citizens working together to improve/increase senior/disabled transportation resources in the region.

As seniors/disabled individuals become more familiar with transportation options and meet representatives of transportation, city government, and the AOA’s transportation staff, the more the transportation system will be used, creating a more robust and viable network of transportation resources in the region.

6. What will happen to the proposed project if Measure X grant funding is not awarded (e.g. loss of matching funds, impacts on overall project vision, project momentum, timing difficulties, etc.)? (500 words max.)

The existing transportation program and expanded program will rely on the TAMC funding for 83% of its funding, with the remaining portion provided by AOA fundraising dollars. The AOA conducts ongoing fundraising help reduce/fill budget gaps. Using methods such as personal solicitation, foundation funding and special events, AOA is able to raise a good portion of the annual organization budget to support our efforts.

Should Measure X funding not be awarded, the existing program would be significantly reduced, functioning more as a component of Information & Referral at the AOA's front desk. Lacking financial resources, none of the personalized one-to-one appointments with seniors or group education and community outreach would be provided. And, based on the AOA's long history of fundraising on the Central Coast, there are no other specific funding sources for senior transportation. Even if a small pool of funding could be raised, based on grant cycles, much of the program's staffing and momentum would be lost. In fact, local sources have been reduced over the years as organizations such as the United Way have shifted their funding priorities to other demographic groups. Once a major source of funds for the AOA, we now receive zero dollars from the United Way for senior programs.

Geographic Equity – 15 points

7. Identify which sub-area of Monterey County (North Monterey County, Greater Salinas Area, Monterey Peninsula, South Monterey County, Big Sur Coast) this project will benefit. (500 words max.)

The program will continue serving Salinas at its current capacity, present educational sessions and distribute information packets county-wide at events; and expand into the South County region, specifically Soledad. Later in the grant cycle, rural North County communities will be folded into the mix.

Currently, the program has provided robust coordination of services in Salinas. Expanding our services with additional staffing will enable the program to maintain a high level of service in Salinas while expanding both existing program services and advocating for additional transportation in South County. This region's seniors are underserved due to a lack of local direct service transportation providers. Bus service is "on-call", not always available to seniors during peak hours and there are no taxi voucher rides available in South County. AOA staff's experience working in the region (20% of our clients in FY18-19 reside here), principally with Hispanic seniors, is that language and economic barriers endure that also prevent the use of existing services. Due

to historical experience of many individuals, it takes a significant amount of time to build trust with this population. Our Transportation Program's Coordinator is bicultural/bilingual and has the added benefit of 'standing on the shoulders' of AOA colleagues who currently work in the area, providing health education seminars, Medicare counseling, and community outreach.

In North Monterey County, from Prunedale west to the coastal communities of Moss Landing and Castroville, while there is sufficient bus transit service, again, there are no taxi voucher programs available. According to its website ITN, at this time, serves only Castroville. Outreaching in these communities and providing one-to-one appointments for seniors to educate them about the services that are available will help to ensure greater utilization of existing resources.

8. Identify which sub-areas (North Monterey County, Greater Salinas Area, Monterey Peninsula, South Monterey County, Big Sur Coast) the proposed project will provide trips. (500 words max.)

N/A. This program does not provide direct transportation.

9. Describe partnerships with other entities and their corresponding roles (if any) in the proposed project. (500 words max.)

Monterey Salinas Transit. The AOA enjoys a longstanding working relationship with MST and its staff. Housed in our Salinas office for three years prior to moving to the downtown transit hub, we developed a mutually beneficial system of referrals between the two organizations. During those years we became involved in the enrollment and distribution of taxi vouchers. Due to the high number of seniors that frequent the Salinas office, AOA has continued in this capacity as a trusted partner. (see attached Letter of Support)

ITN Monterey County. This proposal includes as one of its goals, the encouragement and promotion of volunteerism with the ITN Program, which is poised to expand services in South County. Over a period of many years, the AOA has firmly established itself in the (senior) community there and can promote the ITN program and benefits via seniors, their younger family members, community service groups, e.g. Rotary Club, and AOA's own events. (see attached Letter of Support)

Local Non-Profit Organizations: AOA has long-established partnerships such as the Area Agency on Aging, Meals on Wheels of Salinas Valley and Monterey Peninsula, Legal Services for Seniors, CCCIL, and other senior housing sites and communities throughout the county, Center for Deaf and Hard of Hearing, Blind and Visually Impaired (Measure X grant recipient) Veterans Transition Center (Measure X grant recipient).

Informal Partnerships: After many years of providing a succession of programs throughout Monterey County communities, AOA has developed working relationships with a large number of organizations that host our presentations, support groups outreach and other events. These include: local libraries, senior apartments, churches, senior and community centers, nursing facilities, Monterey and King City fairgrounds, and more.

Cost Effectiveness – 15 points

10. Explain how your organization’s services are provided:

a. Number of trips and average cost per trip. (500 words max.)

N/A. This program does not provide direct transportation services. See 10b.

b. Number of non-trip mobility services provided and average cost per non-trip mobility service provided. (500 words max.)

The AOA program non-trip mobility services include four components. The four chosen components best reflect the projected use of staff time and financial resources and include expansion in both South and North County regions.

Service Definitions
 1 Person receiving an individual assessment = 1 service unit
 1 Person registering for/receiving taxi vouchers = 1 service unit
 1 Person registering for/receiving bus passes = 1 service unit
 1 Group presentation = 1 service unit

Projected Service Units

# of Persons receiving an individual assessment:	750
# of Persons registering for/receiving taxi vouchers:	750
# of bus passes distributed:	3,150
# of Group presentations (reaching 6,000 people):	<u>165</u>
TOTAL Service Units	4,815
 Cost per Service Unit:	 \$59.61

11. Submit a completed Project Budget.



*The project budget provides a cost estimate reflecting all costs associated with the project by fiscal year. Identify costs to be funded by the Measure X grant and costs covered by other funding sources (see **Appendix A** of the Program Guidelines for a sample Project Budget template).*

Transportation Agency for Monterey County
Measure X - Senior & Disabled Transportation Program
Fiscal Year 2020-2021 to 2022-2023

PROJECT BUDGET

Organization: Alliance on Aging, Inc. **Total Project Budget:** \$346,000
Project Name: Senior Transportation **Measure X Request:** \$287,000
Project Dates: July 2020 through June 2023 **Funding Leverage:** 17%

Income	Measure X	Other Proposals	Committed Funds/Existing Operational Budget	Program Revenue	TOTAL
Measure X	\$287,000				\$287,000
Foundation A		\$7,000			\$7,000
Foundation B		\$7,000			\$7,000
State Grant					\$0
Annual fundraising event			\$45,000		\$45,000
Individual donations					\$0
	\$287,000	\$14,000	\$45,000	\$0	\$346,000

Expenses	Measure X	Other Proposals	Committed Funds From AOA	Program Revenue	TOTAL
Salary Program Manager	\$7,000		\$25,000		\$32,000
Salary Full-time staff 1	\$119,000				\$119,000
Salary Part-time staff 1	\$58,900				\$58,900
Admin	\$10,000	\$14,000	\$16,000		\$40,000
Taxes and Benefits	\$33,000		\$4,000		\$37,000
Consultant					\$0
Telephone	\$4,900				\$4,900
Supplies	\$4,800				\$4,800
Travel	\$8,000				\$8,000
Publications/Postage	\$6,500				\$6,500
Rent and Utilities	\$9,000				\$9,000
Staff training					\$0
Equipment	\$4,900				\$4,900
Bus Passes	\$18,000				\$18,000
Insurance / General Liability	\$3,000				\$3,000
	\$287,000	\$14,000	\$45,000	\$0	\$346,000

Transportation Agency for Monterey County
Measure X - Senior & Disabled Transportation Program
Fiscal Year 2020/21; 2021/22 and 2022/23

ALLIANCE ON AGING

Senior Transportation Coordination and Advocacy

PROJECT TIMELINE

1. Community Education and Training for Senior Service Providers

STS will conduct individual and group training to staff in the local senior service network to make them aware of transportation options and the services of Alliance on Aging and other Measure X grantees.

Deliverables:

- Lists of organizations and individuals trained

Timeline: Ongoing throughout grant period

2. Comprehensive Transportation Resource List, Printed & Published Materials

STS staff will continue to engage with local transportation providers to ensure staff have the most current information to use in their coordination, education and dissemination of information.

Deliverables:

- A current and comprehensive list of transportation resources and services for seniors and people with disabilities.
- AOA published material and website will reflect current information about program services.

Timeline: Ongoing through grant period

3. Outreach

STS staff will outreach to seniors and their family members at senior housing communities, community events, churches, schools, shopping centers, work sites and other identified locations to make them aware of transportation services and options that are available. STS will provide training to individuals/or groups in the community at senior venues and other venues as identified

Deliverables:

- Lists of individuals and groups who have received training/education
- List of events or locations attended by STS with number of attendees

Timeline: Project is ongoing 2020 - 2023

4. Individual Transportation Coordination

STS will identify & meet with seniors and/or family members who would benefit from transportation assessment and coordination of resources and services.

Deliverables:

- # Individuals receiving information about MST Public Transit System
- # Information & referrals given to MST for Travel Training
- # Individuals registered in MST Taxi Voucher Program
- # Individuals assisted with registration for MST Trips program
- # Individuals receiving information about the MST bus passes
- #Individuals receiving information & registration assistance to other providers i.e. Independent Transportation Network; Call the Car; Freedom Medical Transport; GoGo Grandparent

Timeline: Project is ongoing 2020 - 2023

5. Advocacy for Senior Transportation

Alliance on Aging will actively advocate for increasing transportation services for seniors in in South County & other rural areas of the county.

AOA will serve the convener with South County officials & stakeholders to identify service gaps & explore viable models of transportation.

Deliverables:

- Meetings with city officials, community members and stakeholders
- Documented gaps in transportation services for seniors
- Alternative models of transportation identified
- Expansion or launch of at least 1 new transportation model within the grant cycle

Timeline: Project will begin in September of 2020 and continue through 2023.



Measure X: Senior & Disabled Mobility Grant Program

Letter of Support

January 14, 2020

To whom it may concern:

Monterey – Salinas Transit (MST) is the only transit provider that serves Monterey County and provides an important service to residents by offering mobility options for seniors, people with disabilities, and Veterans. We have enjoyed history and successful partnerships with the Alliance on Aging to help our customers maintain their independence through mobility options.

MST's mission has been supported by the Alliance on Aging through their continuous support for MST's mobility programs to include: taxi voucher for seniors, travel training, MST RIDES, and the Transportation Reimbursement Incentive Program (TRIPs). Also, the Alliance on Aging has participated in MST's Mobility Advisory Committee for many years and has advocated for transportation programs and amenities that increase the availability and accessibility of community transportation services for our clients. In 2014, the Alliance on Aging provided their support to MST's Measure Q ballot, a 1/8-cent sales tax to protect existing and develop new programs for persons with disabilities, seniors, and Veterans.

The Alliance on Aging's project proposal to renew funding to a job position that will oversee the Senior Transportation Support and Assistance Program will enhance coordination with MST in providing transportation services for seniors and persons with disabilities as well as fill gaps in mobility options. We have worked closely with the Alliance on Aging for more than five (5) years and feel confident expressing our full support for their project.

Lastly, with MST's full support, please consider the grant application submitted by the Alliance on Aging for the Measure X: Senior & Disabled Mobility Grant.

Sincerely,

A handwritten signature in black ink, appearing to read "Cristy Sugabo".

Cristy Sugabo
Mobility Services Manager
Monterey-Salinas Transit

January 14, 2020

Ms. Stefania Castillo, Program Coordinator
55 Plaza Circle Suite B
Salinas CA 93901

Board of Directors

Fernando DePaolis, **Chairman**
Monique Le Blanc, **Vice Chair**
Juliana Dacuyan, **Secretary**
Edward Lomboy, **Treasurer**
Louis Algaze
Jeff Craig
Todd Muck
Heather McColgan
Jeff Lamb
Bob Johnson, **Member-rider**

Executive Director
Jessica McKillip

Transportation & Ops Manager
Cheryl Tsuchiura

Re: Measure X Grant proposal support letter

Dear Mr. Castillo:

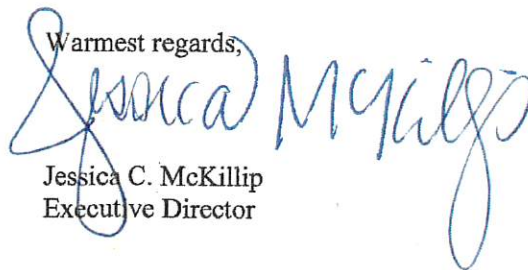
Independent Transportation Network Monterey County (ITNMontereyCounty) is pleased to acknowledge the ongoing partnership with Alliance on Aging, who is providing transportation information and resources to residents residing in rural areas of Monterey County.

ITN*MontereyCounty* is the only service in Monterey County that provides door-to-door, arm-through-arm transportation for seniors, 24 hours a day, and 7 days a week through a network of volunteer and part-time paid drivers. Now in our eighth year, we serve over 500 Senior and visually-impaired members and have delivered over 55,262 rides for any purpose; including medical appointments, grocery shopping, getting a haircut, and visiting friends or relatives in hospital and nursing facilities.

Our goal to develop a pilot project to improve the transportation options in rural areas of Monterey County begins with outreach and securing community support. ITNMontereyCounty commits to coordinating with Alliance on Aging to disseminate information and leverage partnerships throughout the county, host information sessions, recruit and train volunteer drivers in an effort to establish strong resources for rural transportation needs. Our coordinated efforts will include bilingual support to ensure cultural relevance.

We look forward to expanding our partnership with Alliance on Aging, not only for this project but others in the future. If there is any further information I can provide you, please do not hesitate to contact me at 831-233-3447 or jessica.mckillip@itnmontereycounty.org.

Warmest regards,



Jessica C. McKillip
Executive Director