

Adopted by the Transportation Agency for Monterey County Board of Directors: October 25, 2017

Measure X Senior & Disabled Transportation Program

Grant Program Guidelines

Program applications due: Friday, December 1, 2017, noon PST

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Measure X

The Transportation Agency for Monterey County placed the Transportation Safety & Investment Plan (**Measure X**) on the November 8, 2016 ballot. and the measure was approved with 67.7% approval from Monterey County voters. **Measure X** is anticipated to generate an estimated \$20 million annually for a total of \$600 million over thirty years through a retail transactions and use tax of a three-eighths' of one percent (3/8%). The revenue from the sales tax measure will be used to fund transportation safety and mobility projects in Monterey County.

Based on extensive community and stakeholder input, Measure X priorities are to:

- Maintain local roads and repair potholes
- Increase safety and reduce congestion
- Improve transportation for youth, seniors, people with disabilities and working families
- Make walking and biking safer

Measure X funds are divided into two programs:

1. Local road maintenance, pothole repairs and safety: 60% of Measure X funds are allocated to the County of Monterey and incorporated cities for local street and road safety and maintenance improvements.
2. Regional safety, mobility and walkability: 40% of Measure X funds are allocated to regional safety and congestion relief, transit and bicycle/pedestrian projects.

Senior & Disabled Transportation Services Program Overview

Program Purpose & Goals

The Senior & Disabled Transportation Services Program is part of the Regional Safety, Mobility and Walkability Measure X Program. The purpose of this program is to increase transportation services for seniors and persons with disabilities to support their ability to live independently in their homes and communities.

Per Measure X policies, this program is intended to fund non-profit transportation services to support seniors and persons with disabilities.

As spelled out in the policies and projects of Measure X, the goals of this program are to:

- Give seniors more transportation options
- Support independent travel by people with disabilities
- Provide safer and more reliable senior transportation services



The intent of this program is to fund projects, programs and operations that meet these goals.

Stakeholders & Representatives

The MST Mobility Advisory Committee serves as TAMC's Social Services Transportation Advisory Council. In that capacity, the Committee serves as the stakeholder group for the development and implementation of this Measure X program. Membership of the Committee includes representatives from organizations that serve seniors, people with disabilities, veterans and low-income people. The Committee is comprised of the following organizations:

- United Way Monterey County
- Visiting Nurse Association
- Interim, Inc.
- Alliance on Aging
- Central Coast Center for Independent Living
- Monterey County Department of Social & Employment Services/Area Agency on Aging
- The Carmel Foundation
- The Blind and Visually Impaired Center
- ITN Monterey County
- Veteran's Transition Center
- MC Military & Veteran's Affairs

The Measure X Oversight Committee will also participate in the development of the grant process and call for projects. Other stakeholders to be included in the process include:

- Salinas Senior Center
- La CASA Adult Daycare Center
- South County Outreach Efforts group

Funding & Eligibility

Funding

This program funding allocation is \$15 million over 30 years, which is approximately \$500,000 per year. Implementation strategies were developed with the assistance of the Monterey-Salinas Transit Mobility Advisory Committee. The Committee recommended funding be available in 3 to 5 year funding cycles. A 3-year cycle of funding will be available for this initial period. Approximately \$1.5 million will be available for the initial program's 3-year cycle covering fiscal years 2017/18, 2018/19 and 2019/20. Funds not programmed in the current funding cycle will be carried forward and made available in future cycles.



Eligible Applicants

Measure X Senior & Disabled Mobility Program funds are available for 501(c)3 non-profit organizations that serve Monterey County residents. Organizations or collaborative projects that are not registered 501(c)3 non-profit organizations can partner with a tax-exempt, 501(c)3 non-profit organization that will serve as a fiscal sponsor for project implementation. Public agencies may be eligible if they partner with 501(c)3 non-profit organizations to complete the work included in the grant proposal.

Organizations may submit one-time or multi-year project funding requests.

Eligible Activities & Expenses

This program provides capital and operating assistance grants for projects that support mobility options for seniors and people with disabilities. Eligible activities include, but are not limited to:

- Capital projects such as:
 - Purchase or lease of accessible vehicles and vans
 - Computer hardware, software or other equipment that will support mobility programs

- Operations projects such as:
 - Operation expenses directly related to service provided to seniors and/or disabled residents of Monterey County
 - Planning, development and implementation of service area/hours expansions
 - Marketing campaigns to promote mobility services for seniors and persons with disabilities
 - Voucher, mileage reimbursement and/or other trip subsidy programs

Application Timeline & Score Criteria

Application Review Process & Score Criteria

Applications will be reviewed for completeness and assigned to a review committee for scoring. The review committee will be made up of TAMC staff, representatives from the MST Mobility Advisory Committee and the eXcellent Transportation Oversight Committee. The review committee will review and rank the applications based on the following criteria:

- 1. Applicant experience:** Organization has demonstrated knowledge experience serving seniors and/or people with disabilities. **20 points**
 - Applicant has experience providing social services for seniors and/or people with disabilities:
 - More than 5 years: **10 points**
 - 3 – 5 years: **7 points**
 - 1 – 3 years: **5 points**
 - 2 - 3 years: **3 points**
 - 1 – 2 years: **2 points**
 - Less than 1 year: **1 point**
 - Applicant has experience providing transportation services for seniors and/or people with disabilities:
 - More than 5 years: **10 points**
 - 3 – 5 years: **7 points**
 - 1 – 3 years: **5 points**
 - 2 - 3 years: **3 points**
 - 1 – 2 years: **2 points**
 - Less than 1 year: **1 point**

- 2. Project feasibility and readiness:** Project readiness for implementation and ability to implement the project within the 3-year funding timeline. **20 points**
- Project is ready for implementation within 3 months of funding award, and has a reasonable schedule for implementation: **20 points**
 - Project will be ready for implementation within 6 months of funding award, and has a reasonable schedule for implementation: **15 points**
 - Project will be ready for implementation within 1 year of funding award, and has a reasonable schedule for implementation: **10 points**
 - Project will be ready for implementation within the 3-year timeline of funding award, and has a reasonable schedule for implementation: **5 points**
 - Project will not be ready for implementation within the 3-year timeline of funding award: **1 point**
- 3. Project need and relative level of urgency:** The project fills a gap in transportation services for seniors and/or people with disabilities. **20 points**
- The applicant has documented how the project fills a gap in the transportations needs for seniors and/or people with disabilities, and clearly and convincingly explains how the project fills this gap and will meet an important community need: **20 points**
 - The applicant elaborates on how the project fills a gap in the transportations needs for seniors and/or people with disabilities, and convincingly explains how the project will fill this gap and will meet an important community need: **15 points**
 - The applicant somewhat explains how the project fills a gap in the transportations needs for seniors and/or people with disabilities, and explains how the project will fill this gap and will meet an important community need: **10 points**
 - The applicant minimally explains how the project fills a gap in the transportations needs for seniors and/or people with disabilities, and explains how the project will fill this gap and will meet an important community need: **5 points**
 - The applicant does not adequately explain how the project fills a gap in the transportation needs for seniors and/or people with disabilities: **0 point**

- 4. Geographic Equity:** Percent of seniors and/or people with disabilities in Monterey County served or eligible to use service and communities served. **15 points**
- Eligibility coverage:
 - 76% to 100% of seniors and/or persons with disabilities in Monterey County will be served or are eligible to use the proposed project service: **5 points**
 - 51% to 75% of seniors and/or persons with disabilities in Monterey County will be served or are eligible to use the proposed project service: **4 points**
 - 26% to 50% of seniors and/or persons with disabilities in Monterey County will be served or are eligible to use the proposed project service: **3 points**
 - Less than 25% of seniors and/or persons with disabilities in Monterey County will be served or are eligible to use the proposed project service: **2 points**
 - Geographic regional significance:
 - Provides service countywide and service to destinations outside of the county: **10 points**
 - Provides service countywide: **7 points**
 - Serves more than two geographic areas or jurisdictions: **4 points**
 - Serves one geographic area or jurisdiction: **2 points**
- 5. Project cost effectiveness:** Project ability to leverage other public or private funding sources. **15 points**
- Project leverages other public or private funding sources, and this funding request accounts for less than 25% of the project budget: **15 points**
 - Project leverages other public or private funding sources, and this funding request accounts for 26% - 50% of the project budget: **10 points**
 - Project leverages other public or private funding sources, and this funding request accounts for 51% - 75% of the project budget: **5 points**
 - Project does not leverage other public or private funding sources, and this funding request accounts for 100% of the project budget: **1 point**

Once the Review Committee reviews and scores the applications, TAMC staff will develop a recommendation program of projects list that will be presented to the TAMC Board of Directors for adoption. The TAMC Board of Directors maintains discretion in amending the program of projects based on funding availability, and in making full or partial awards.

Application Proposed Timeline

Date	Task
September 27, 2017	<ul style="list-style-type: none"> TAMC Board of Directors releases draft guidelines for public review MST Mobility Advisory Committee reviews draft guidelines
October 17, 2017	<ul style="list-style-type: none"> eXcellent Transportation Oversight Committee reviews draft guidelines
October 30, 2017	<ul style="list-style-type: none"> Call for projects open
<u>December 1, 2017, noon PST</u>	<u>applications due</u>
December 4 – 8, 2017	<ul style="list-style-type: none"> Review Committee meets to score applications
January 31, 2018	<ul style="list-style-type: none"> TAMC Board of Directors adopts Program of Projects for Fiscal Years 2017/18, 2018/19, 2019/20

Policies

Transportation Safety & Investment Plan Policies

The following policies apply to projects funded by this Measure X Senior and Disabled Transportation Program:

- Transportation Safety & Investment Plan Account:** For ease of tracking and to assure full transparency, all revenues received and expenditures of these funds will be accounted for and tracked in its own separate account titled “Transportation Safety & Investment Plan Account” and will not be comingled with any other funds.
- Eligibility Verification:** Under no circumstances may the proceeds of this transportation sales tax be applied to any purpose other than for transportation projects, programs and activities. Awarded applicants will certify in an annual verification submitted to TAMC that these transportation funds were used for eligible expenses.
- Maintaining Local Transportation Funding Efforts:** Measure X funds cannot supplant other funds that are currently committed to the applicant’s project.

Measure X Senior and Disabled Transportation Program Specific Policies

The following policies apply specifically to this Measure X Senior and Disabled Transportation Program:

- **Multiple applications:** Organizations can submit more than one application per grant cycle reflecting different operational or capital needs.
- **Funding Agreement:** Organizations selected for funding must sign a funding agreement with TAMC.
- **Annual Report:** Organizations selected for funding must provide an annual report documenting communities served and success meeting project goals and proposed outcomes
- **Audits:** TAMC reserves the right to audit organizations that are awarded funding under this project.
- **Media Releases:** Organizations selected for funding must use the Measure X logo when promoting projects, programs or services funded by this Measure X program and acknowledge the Measure X program in news releases.
- **Project Payments:** Once funds are allocated to an approved project, the project sponsor has three years to expend the funds. Capital project expenses may be invoiced directly to TAMC and must include documentation of competitive procurement solicitation process with a minimum of 3 bids and the vendor invoice. Operating project expenses may be claimed in advanced to cover estimated operating expenses for that quarter. Invoiced costs are to be on a quarterly basis and must comply with Measure X Transportation Safety & Investment Plan policies. Each claim following the first claim for payment must include documentation (procurement solicitation process if applicable, receipts, vendor invoices, and progress reports) to be deemed valid. The Transportation Agency Measure X Senior and Disabled Transportation Program Project Manager, Finance Officer, and Executive Director will review and recommend approval or rejection of the claims.



Measure X - Senior & Disabled Transportation Services Program Application

Organization:	Date Submitted:
Project Title:	Brief Project Summary:
Total Project Cost:	Funds Requested:

Required Contents

Applications are due via email to **Virginia Murillo**, program coordinator, (virginia@tamcmonterey.org) on **December 1, 2017 at 12:00 P.M. PST**. The application must be submitted in a PDF format and include:

- Signed cover letter
- Completed application sections 1-4
- Project implementation timeline
- Project budget

Additional information such as letters or support, testimonials, maps, photographs and additional information about the organization is not required, but if included should be limited to ten (10) pages.

1. Applicant Information

Score Criteria #1: Applicant Experience (20 points)

Is the applicant a 501(c)(3) tax exempt organization?	<input type="checkbox"/> Yes <input type="checkbox"/> No
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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 fiscal sponsor may be a 501(c)(3) organization. The applicant must complete the following information about the fiscal sponsor.

Fiscal Sponsor Information:	
Name	
Address	
Tax ID #	
Fiscal Sponsor Contact	
Telephone Number	
Email Address	
Fax Number	
Organization Year Established	
Years Operating in Monterey County	
Organization Mission Statement	

Description of Organization: Describe your organization's scope of services, communities served, experience serving seniors and/or people with disabilities. Describe your organization's experience providing or coordinating transportation services for seniors and/or people with disabilities.

Number of Employees	
Number of Volunteers	
Board of Directors: Describe the composition of your Board of Directors.	

2. Project Description and Project Implementation Timeline

- Score Criteria #2: Project Feasibility and Readiness (20 points)

Project Name	
Funding Request Amount	
Other Funding Sources Allocated to this Project	
Total Project Cost	
Funding Request Type	<input type="checkbox"/> One-time request <input type="checkbox"/> Multi-year request
If multi-year, which fiscal years is this funding request for?	<input type="checkbox"/> 2017/18 <input type="checkbox"/> 2018/19 <input type="checkbox"/> 2019/20
Project Type	<input type="checkbox"/> Capital <input type="checkbox"/> Operating
Brief Project Description: (100 words max)	

Project Area Served: Describe the communities that will be served by the project.

Measure X Project Goals: Indicate which of the Measure X program goals the project will address.

- Give seniors more transportation options
- Support independent travel by people with disabilities
- Provide safer and more reliable transportation services for seniors and/or people with disabilities

Project Implementation Timeline

Develop an implementation timeline that identifies key tasks, milestones and corresponding due dates. Include this as an attachment to the application.

3. Project Benefits and Communities Served

- Score Criteria #3: Project Need and Relative Level of Urgency (20 points)
- Score Criteria #4: Geographic Equity (15 points)

Project Need (200 words max)

Project Goals (200 words max)

Communities Served: Describe the communities that will benefit from this project. Describe the percentage of seniors and/or people with disabilities that are eligible to benefit or will be served.

Project Scope of Work: Describe the main tasks of the project.

Expected Project Outcomes: *Example – Service hours will expand by ##% to serve ## more passengers per month/year.*

Project Evaluation: Describe how you will measure the project outcomes and track your progress towards achieving the project goals.

4. Project Budget

- **Score Criteria # 5: Cost Effectiveness (15 points)**

Develop a project budget that identifies the cost of each key task, with capital and operating costs called out separately. If this funding request will leverage other funds, identify which phases of the project will be funded by each funding source.