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Transportation Assistance
Benefits Checkup



November 29, 2022

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 Cycles 1 and 2. We plan to continue our transportation work in Cycle 3 and expand our advocacy efforts for transportation for seniors in the rural, underserved areas of the county.


As the enclosed narrative illustrates, we will continue to provide information and access to transportation options to seniors and individuals with disabilities. COVID had a definite impact on their lives and ability to leave their homes and engage with other individuals and groups. We are aggressively reaching out to them throughout the county to ensure they have access to all transportation options that are available.

AOA is proud of our partnership with ITN and the National Pilot iTN Country Project. The goal was to develop a rural transportation project for seniors in South and North Monterey County. Together we established Steering Committees from both areas who met monthly to discuss needs and transportation gaps. As a result, two rural projects were launched this last summer: ValleyLine and NorthLine. AOA is excited to continue this partnership to ensure growth of these projects

In Year 2 and 3 of Cycle 3, AOA will apply this model to reach the underserved and rural seniors and disabled individuals in Carmel Valley and Big Sur Coast. We will be meeting with members of the community and public officials to discuss transportation gaps and solutions for these residents.

This year, Alliance on Aging celebrates 52 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)


Teresa Sullivan//Executive Director

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Monterey, CA 93940
831-646-1458 Phone
831-646-1232 Fax

247 Main Street
Salinas, CA 93901
831-655-1334 or 831-758-4011 Phone
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Spirals Consignment
& Benefit Shop
570 Lighthouse Avenue
Pacific Grove, CA 93950
831-383-5030 Phone

AllianceOnAging.org



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: 11-29-2022

Applicant Information

Implementing Organization's Name: Alliance on Aging
Grant Amount Request: \$303,000
Contact (name and title): Teresa Sullivan
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 2023/24, 2024/25, AND 2025/26.

Measure X Senior & Disabled Transportation Program

Program Application

Required Contents

Applications are due via email to Aaron Hernandez, program coordinator, (aaron@tamcmonterey.org) on **Thursday, December 1, 2022 at 12:00 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: _____

Applicant Information

Implementing Organization's Name: Alliance on Aging

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Contact (name and title): _____

Contact Email: _____

Contact Phone Number: _____

Tax ID #: _____



Program Application

Project Title

Provide a brief project title.

Senior Transportation Coordination Project – Phase 3

Organization's History

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

This year, the Alliance on Aging (AOA), a nonprofit (501c3) organization serving the needs of a growing number of older adults in Monterey County, celebrates its 53rd year of service to seniors, their families, and caregivers. What began as a group of concerned citizens sitting around a kitchen table in 1970, has grown into a highly respected and well-known organization and community partner. We serve 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. Programs 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. The 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, including "Fortaleciendo el Bienestar" or "Strengthening Wellness", a series of health lecture topics focusing on Spanish-speaking seniors.
3. The Tax Counseling program's trained volunteers, in conjunction with the IRS, help prepare both state and federal annual tax returns, at various sites in Monterey County. They also help with IRS problems throughout the year. All work is completely confidential.
4. Outreach and Education provides information and referrals to senior services throughout the county. Our staff travel from South County to Castroville in the distinctive AOA van, 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, 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 Coordination program, added in 2018-19, is funded almost exclusively TAMC’s Measure X Senior & Disabled Transportation grant. Through two funding cycles, the program has made great strides in assisting seniors to understand and access available services and plan transportation routes with a focus in South County, Salinas, and North County. This grant application, if successful, will expand this program’s reach further into the senior community.

8. The HUB: In December of 2021, AOA launched a “no wrong door” model of service in expanded space in their Salinas office on Main St. With an entrance at 236 Monterey St, the HUB includes six additional tenant partners who provide services and resources on site. The new space includes a community room for wellness and enrichment activities and a conference room for meetings, presentations, and educational seminars.

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 Coordination program funded by TAMC in Cycle One and Two; if awarded a grant in Cycle 3 funding, we will expand the program to:

- continue to meet with North and South County Steering Committees to ensure growth of Valley Line and North Line rural Projects, volunteer recruitment, and to evaluate progress & service levels. (Years 1-3)
- work with seniors throughout the county to help them navigate the changes in the MST’s new “Better Bus Network” which will be rolled out in 2023.
- continue to provide transportation outreach (in person and in print) and training to senior service providers, at community events, and senior residences.
- continue to enroll seniors & disabled individuals in MST transportation and other provider programs, e.g., Call the Car, Freedom Medical Transport, GoGo Grandparent (Years 1-3)
- Coordinate bus/field trips for seniors with MST to promote use of public transit.
- expand beyond referrals to ITN and iTN Country to include assistance with the enrollment process (Years 1-3)
- convene meetings with local officials/community members in Carmel Valley and Big Sur coast communities to understand unmet needs along rural routes, with a goal of expanding senior/disabled transportation services there. (Years 2-3)

Building on the accomplishments of funding Cycles 1 and 2, we will continue to focus our efforts with ITN on maintaining and growing participation in the South and North Valley bus lines, as part of the ITN Country program. We will continue to recruit volunteer drivers to transport ITN clients.

As before, our staff will provide community and in-office one-on-one appointments to assist seniors in understanding their options/eligibility for a variety of transportation programs, assisting with enrollment. Enrollment services will be expanded to include assistance completing and submitting the lengthy ITN application. AOA has found enrollment services can significantly break down barriers to participation. Completing forms can be difficult for many: a senior may be lacking online resources, the form is cumbersome, s/he may be confused about the questions. Since developing the Benefits Checkup program (see above) several years ago, we have enrolled thousands of seniors in benefits programs. Staff has the institutional knowledge and experience to wrap ITN enrollment into this package with the added benefit that a transportation client may enroll in other programs, e.g., farmers market coupons, CalFresh, PGE CARES program.

During Years 2 and 3, AOA proposes to grow its program by replicating our role as a “convener” to assess and advocate for additional senior/disabled transportation resources in the Carmel Valley and Big Sur regions. The Executive Director, with the support of the Transportation Coordinator, proposes to meet with area officials including Board of Supervisors representative, community members, and other key informants to commence a community-wide conversation about senior and disabled transportation needs in these rural areas. Initial topics of discussion at the local level may include a variety of approaches from exploring means for transporting clients to existing bus routes or assisting a community of volunteers to develop a “vanpool” service to expanding and improving existing resources for seniors and disabled individuals.

Deliverables 2023-26

Provide Trainings to Senior Service Providers

- Provide individual/group trainings annually to senior service providers county-wide (5 trainings annually)
- Maintain lists of contacts & training (**ongoing**)
- Resource list, website & materials will be accurate & current (**ongoing**)

Provide transportation information to seniors

- Distribute transportation information to both AOA offices and other senior-frequented venues (**120** unique sites annually)
- Provide training to groups or individuals on transportation options (**12** trainings annually)

Provide one on one support to seniors (260 clients annually) in one or more of the following:

- Identify & meet with seniors county-wide who would benefit from individualized transportation assessment
- Provide information & assistance to help seniors navigate MST’s new Better Bus Network
- Provide information and assistance with enrollment in the MST Rides program

- Provide information & make referrals to MST for Travel Training
- Coordinate bus/field trips for seniors with MST to promote use of public transit
- Provide information and assist with registration to MST Taxi Voucher Program
- Provide information & assist with registration for MST Trips program
- Provide information & registration assistance to other providers i.e., Independent Transportation Network (ITN and iTN Country); Call the Car; Freedom Medical Transport; GoGo Grandparent; and other newly identified and vetted transportation options.

Distribute MST bus passes to seniors throughout all areas of the county. (2,000 passes distributed annually)

Continue involvement in the growth of the NorthLine & ValleyLine Valley bus lines (6 annual meetings)

Advocate for increased transportation services in unincorporated areas of Monterey Peninsula (Carmel Valley) and Big Sur Coast (Big Sur) (6 annual community meetings in Years 2&3)

Project Need

Based on TAMC's 2022 Needs Assessment, "18% of Monterey County's population qualifies for senior and disabled transportation services. Over 25% of Monterey County's seniors and disabled population live in unincorporated towns and rural areas." Additionally, the county's senior population is projected to grow by 12% between 2020 and 2040, with the greatest growth in the age 70-85+ segment, indicative of the need to continue growing transportation options for seniors. 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. A lack of awareness and access to transportation leads to increased isolation for people who already are 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, and those who are not used to using public transport often find the system complex and confusing. The AOA has a long 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?

One .8FTE Transportation Coordinator; two .25FTE Transportation Assistants; one .2FTE Outreach Manager



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.

The program grew out of a need for information about the various transportation services available to seniors who can no longer drive or do not have the financial means to support vehicle ownership. While each provider of services does a good job of promoting its service, there has been no central source of information about all senior transportation options until AOA assumed this role in Cycle 1 of Measure X funding.

During the 2nd cycle of the grant, the Covid pandemic had a devastating effect on the senior population due to its high-risk nature, isolating them at home much longer than younger cohorts. As with many organizations, AOA to conduct services, by phone, mail, Zoom meetings, and drop-off communication. This past spring, the program moved into high gear again, providing outreach at community fairs/events, at senior luncheons and farmers markets, and in the office.

We are pleased at the Senior Transportation Program most recent results in FY21-22 Cycle 2:

- ✓ Maintained and grew a resource list of transportation services for senior and/or disabled individuals
- ✓ Attended 129 outreach events throughout the county, distributing a total of 5,800 flyers about our program offerings
- ✓ Met with 267 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 1,312 bus passes to seniors
- ✓ Registered/assisted 153 seniors for the MST taxi vouchers

The transportation program “piggy-backs” with other AOA programs to maximize exposure of clients to as many opportunities as possible. For example, the Community Outreach Program staff travels around the county to provide information and assistance. At the office, additional staff 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 December 2021, AOA opened the HUB, another one-stop shop for seniors, in the newly expanded space of its Salinas office. There, the AOA and six tenant partners provide services and resources. The space includes the Aging and Disabilities Resource Center, Blind & Visually Impaired Center, Central Coast Center for Independent Living, Ecology Action, Home

Match, and Independent Transportation Network. The HUB is just one more way the AOA is partnering with other providers to extend its reach in the community.

In an organization that individually served 20,621 last fiscal year, there are continual opportunities for seniors to access many resources, including transportation assistance.

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

This program does not provide direct transportation services; rather, we act as a one-stop shop for seniors to obtain comprehensive information about travel options, develop tailored transport plans with our Transportation Coordinator, and obtain bus passes and taxi vouchers. We market transportation materials at dozens of community events and senior gathering sites; and we coordinate and convene meetings with local officials and stakeholders to raise awareness of the senior/disabled population's transport barriers, and to improve transportation options in our service area.

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 avoid service duplication and to act as an information clearing house for seniors, who often need more assistance than younger users of public transportation.

Social service networks are notoriously fragmented. Understanding which services a given agency provides and how to access them can be confusing and sometimes bureaucratic. As part of a successful Phase 1 & 2 of this project, and to ensure that service providers are aware of each other's offerings, AOA staff currently serve on the following groups: Monterey County Mobility Advisory Committee, TAMC Oversight Committee, Aging and Disabilities Resource Network, North and South County Rural Transportation Steering Committees. Our Community Outreach Manager regularly attends MST meetings. Working together, key providers have partnered on projects that play to the strengths of each, and therefore, avoided duplication.

As many seniors are not comfortable using telephone apps or the internet to access services and some low-income seniors cannot afford a cellphone, AOA helps them to obtain free cell phones and iPads; and we also provide technology training for the devices.

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.

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 detailed in the Program Purpose & Goals section of the proposal, AOA will continue its work in the **South and North regions** of the county, maintaining coalitions and partnerships developed during funding Cycles 1 & 2, with an aim to increase senior/disabled transportation resources there, while expanding the program's activities into the **Monterey Peninsula** (Carmel Valley) and **Big Sur regions**.

- AOA will work with seniors to help them understand and navigate MST's new Better Bus Network that will be rolled out during this cycle.
- AOA's Transportation Program staff will continue to promote and encourage volunteering by South County and North County residents with both the ValleyLine and NorthLine.
- AOA will promote the MST's "TRIPS" program, which reimburses mileage for eligible family, friends and other providers when transporting a senior/disabled individual.
- On behalf of ITN, AOA's Transportation Program staff will provide individual enrollment services to seniors/disabled who need assistance completing the form; AOA community outreach program will publicize this service as part of its commitment to reach as many enrollees as possible.
- 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 in both Carmel Valley and Big Sur for purposes of evaluating local needs and desires. A survey, such as that conducted in the last cycle, will provide valuable information about senior uses of and barriers to transportation.

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

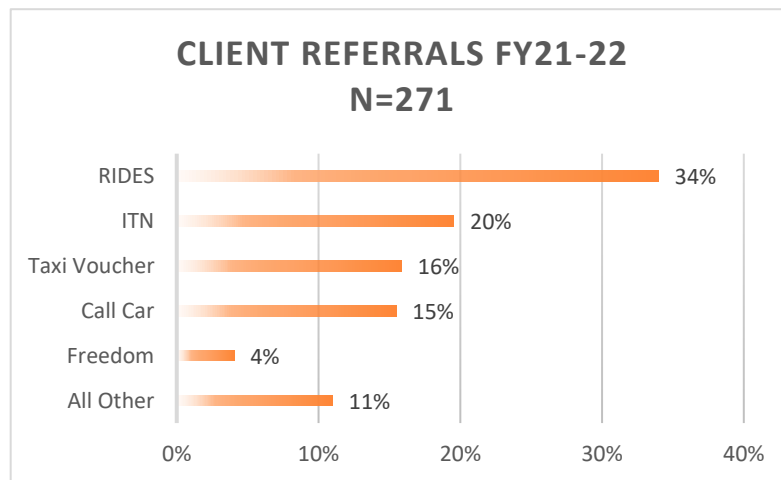
According to the 2016-2020 American Community Survey 5-Year Estimates (Table S1810), 30% of Monterey County’s senior population, age 65+ has a disability. Although the AOA no longer collects data on specific type of disability, the FY21-22 intake database of 277 individuals indicates similar results:

- 59% stated they have no disability
- 29% stated they do have a disability
- 13% did not respond to question

Earlier data collected by AOA staff in 2019-20 indicated that, of those specifying a disability, the vast majority, 74%, stated their disability was “physical”, potentially affecting mobility. These figures demonstrate the need for an individualized program such as that offered by the AOA’s Transportation Coordination Program.

AOA’s transportation clients this year range from age 42 (client seeking Call the Car program) to age 98 (client seeking ride to medical appointment), 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 who made one-to-one appointments during Cycles 1 and 2, we have a user profile that, combined with disability and age statistics above, illustrates the needs and services selected by clients. The fiscal year 2021-22 clients requested the following referrals:



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

Although the Transportation Coordinator (TC) and Program Assistant (PA) provides service coordination and not direct transportation, the program helps to ensure seniors can travel safely and reliably. Methods by which this is accomplished are:

- Education
 - the TC provides public presentations to seniors, their family/friends at senior centers and residences about the options available in their region
 - the TC and PA travels to events around the county to distribute flyers and answer questions about transportation
- Personalized Planning
 - The TC and PA 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 TC and PA assists a client with an initial application to the MST RIDES program and/or register the client in the Taxi Voucher program
 - The TC and PA provides bus passes to seniors to ensure they have access to a safe form of transportation
 - The TC and PA distributes taxi vouchers to City of Salinas seniors
 - The TC and PA enrolls clients in the ITN program

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. We will provide one-to one assistance completing ITN enrollment forms.
- South County, North County, Carmel Valley, and Big Sur 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 can 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.)*

AOA provides its services countywide; with respect to the Transportation Program, we will:

South County and North County

- continue to meet with the Steering Committees to ensure growth of the Valley and North Lines; and review the status of other transportation options in their area.

Salinas

- continue serving transportation clients at its current robust capacity, present educational sessions and distribute information packets county-wide at events.

Carmel Valley (Monterey Peninsula)

- Senior and disabled residents who live on either side of Carmel Valley Rd. whose homes or communities are in remote areas without access to the public transit system. The only existing bus stops are on Carmel Valley Rd. There are 2,076 residents that are 65-plus and six senior living communities along Carmel Valley Rd.

Big Sur

- Convene community meetings to understand transportation needs of the 332 seniors and disabled individuals that live in the Big Sur area.

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)

CCAH Central California Alliance for Health. Monterey County's local administrator for MediCal provides transportation services for its members. AOA makes regular referrals to them for their transportation services.

Public Officials from King City, Soledad, Gonzales, Greenfield, Board of Supervisors Representative District 2, 3 and 5.

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), and 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 dozens 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:

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 Outreach Event = 1 service unit

Projected Annual Service Units

# of Persons receiving an individual assessment:	260
# of Persons register for taxi vouchers:	70
# of bus passes distributed:	2,000
# of individuals enrolled in ITN Program:	25
# of Group Outreach Events (6,000 people):	<u>165</u>
TOTAL Annual Service Units	2,520
Cost per Annual Service Unit:	\$40.08

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).*

Project Budget

Name of Organization: Alliance on Aging Cycle 3

	TOTAL Measure X Budget	FY 23/24	FY 24/25	FY 25/26	TOTAL Matching Funds	TOTAL Project Cost
EXPENSES						
Personel Expenses						
Salaries	\$ 211,218.00	\$ 67,000.00	\$ 70,350.00	\$ 73,868.00	\$ 55,000.00	\$ 266,218.00
Taxes and Benefits	\$ 24,348.00	\$ 7,800.00	\$ 8,112.00	\$ 8,436.00	\$ 7,000.00	\$ 31,348.00
Total Personel Expenses	\$ 235,566.00	\$ 74,800.00	\$ 78,462.00	\$ 82,304.00	\$ 62,000.00	\$ 297,566.00
Other Expenses						
Supplies	\$ 1,582.00	\$ 500.00	\$ 525.00	\$ 557.00	\$ -	\$ 1,582.00
Equipment	\$ 4,414.00	\$ 1,400.00	\$ 1,470.00	\$ 1,544.00	\$ -	\$ 4,414.00
Insurance	\$ 3,246.00	\$ 1,000.00	\$ 1,080.00	\$ 1,166.00	\$ -	\$ 3,246.00
Telephone	\$ 4,327.00	\$ 1,400.00	\$ 1,442.00	\$ 1,485.00	\$ -	\$ 4,327.00
Rent and Utilities	\$ 8,277.00	\$ 2,600.00	\$ 2,756.00	\$ 2,921.00	\$ -	\$ 8,277.00
Travel	\$ 6,305.00	\$ 2,000.00	\$ 2,100.00	\$ 2,205.00	\$ -	\$ 6,305.00
Publications/Postage	\$ 3,283.00	\$ 1,000.00	\$ 1,100.00	\$ 1,183.00	\$ -	\$ 3,283.00
Bus Passes	\$ 36,000.00	\$ 12,000.00	\$ 12,000.00	\$ 12,000.00	\$ -	\$ 36,000.00
Total Other Expenses	\$ 67,434.00	\$ 21,900.00	\$ 22,473.00	\$ 23,061.00	\$ -	\$ 67,434.00
TOTAL GRANT REQUEST	\$ 303,000.00	\$ 96,700.00	\$ 100,935.00	\$ 105,365.00	\$ 62,000.00	\$ 365,000.00

Transportation Agency for Monterey County
Measure X - Senior & Disabled Transportation Program
Fiscal Year 2023/24; 2024/25 and 2025/26

ALLIANCE ON AGING
Senior Transportation Coordination and Advocacy

PROJECT TIMELINE

1. Provide Training for Senior Service Providers

Deliverables:

- Conduct individual and group training to senior service providers (5 annually)
- Maintain lists of contacts & training (ongoing)
- Resource list, website & materials will be accurate and current. (ongoing)

Timeline: Ongoing throughout grant period

2. Provide transportation information to seniors

Deliverables:

- Distribute transportation information from both AOA offices, the HUB, and other senior frequented venues. Includes updates on MST's new Better Bus Network and the Senior Shuttle. (120 unique sites annually)
- Provide training to groups or individuals on transportation options (12 trainings annually)
- Lists of individuals and groups who have received training/education
- List of events or locations/events and number of attendees

Timeline: Ongoing throughout grant period

3. Provide one on one support to seniors (260 clients) in one or more of the following

Deliverables:

- Identify & meet with seniors county-wide who would benefit from individual transportation assessment
- Provide information and assistance with enrollment in MST Rides program
- Provide information & make referrals to MST for Travel Training
- Coordinate bus/field trips with MST to promote the use of public transit
- Provide information and assist registration for MST Taxi Voucher Program
- Provide information & assist with registration with MST Trips programs
- Provide information to seniors to coordinate trips outside of the county.
- Provide information and registration assistance to other providers i.e.: ITN; iTN Country; Call the Car; Freedom Medical Transport, GoGo Grandparents
- #Individuals assisted with registration for MST Trips program
- #Individuals receiving information about the MST bus passes
- #Individuals assisted with MST Rides
- #Individuals receiving information & registration assistance to other providers i.e. Independent Transportation Network: iTN Country; Call the Car; Freedom Medical Transport; GoGo Grandparent, and other newly identified and vetted transportation options

Timeline: Ongoing throughout grant period 2023- 2026

- 4. Distribute MST bus passes to seniors and individuals with disabilities throughout Monterey County to encourage access and use of public transit. (2,000 bus passes annually)**

Deliverables

- Number of individuals and bus passes distributed
- Locations bus passes distributed

Timeline: Project is ongoing 2023 - 2026

- 5. Continue involvement in the growth of NorthLine and SouthLine Rural Projects**

Deliverables

- Meet with both North and South County Steering Committee (6 meetings annually)
- Maintain agendas and minutes
- Continue to recruit volunteers and participants through AOA Transportation programs outreach.

Timeline: Project is ongoing 2023 - 2026

- 6. Advocate for increased transportation services in unincorporated areas of Monterey Peninsula (Carmel Valley) and the Big Sur Coast. (6 annual community meetings in Years 2 and 3,)**

Deliverables

- Meet with seniors in Carmel Valley and Big Sur to identify service gaps
- Meet with community officials and stakeholders to explore viable models of transportation
- Expansion or launch of at least 1 new transportation model within the grant cycle

Timeline: Project will begin in September of 2024 and continue through 2026



Measure X: Senior & Disabled Mobility Grant Program

Letter of Support

To whom it may concern:

Monterey-Salinas Transit (MST) is the leading transportation provider for Monterey County, offering fixed-route, and paratransit service to Monterey County's 437,000-person population. In addition to fixed-route and paratransit service, MST has several mobility programs focused on addressing the transportation needs of Monterey County's disabled, senior, and Veteran communities. Monterey County is geographically large so it's a challenge to reach all those who need transportation services. However, that challenge has been made manageable by the continued support of partners like Alliance on Aging (AOA), whose knowledge and expertise in senior needs, is unmatched in Monterey County.

The current application seeks to continue funding the Transportation Coordinator, along with 2 part time assistants. We see these positions as vital to the transportation needs of local seniors. To reach the customers who desperately need dependable, accessible, and safe transportation, MST has partnered with AOA over many years to actively promote each other's programs and services. Programs such as the MST Taxi Voucher Program, Transportation Reimbursement Incentive Program (TRIPS), MST RIDES, Special Medical Trips, and travel training programs have all benefitted greatly from the outreach and support provided by the positions that this grant application seeks to fund.

Over the last 18 months I've participated with Alliance on Aging staff on a steering committee to help guide the decision making for an expansion of services by ITN Monterey into rural North and South County areas. Alliance on Aging staff, and their Transportation Coordinator have been key to getting this project off the ground and if AOA is successful in this application, they'll be able to continue their support of the ITN expansion, as well as provide support to other communities that lack transportation resources, such as Carmel Valley and Big Sur.

For these reasons, Alliance on Aging has MST's full support in their Measure X: Senior & Disabled Mobility Grant application.

Very truly yours,

A handwritten signature in black ink, appearing to read "Kevin Allshouse".

Kevin Allshouse
Contract Services Manager
Monterey-Salinas Transit

Advocating and delivering quality public transportation as a leader within our community and industry.

Transit District Members Monterey County • Carmel-by-the-Sea • Del Rey Oaks • Gonzales • Greenfield • King City • Marina • Monterey
Pacific Grove • Salinas • Sand City • Seaside • Soledad **Administrative Offices** 19 Upper Ragsdale Drive, Suite 200 Monterey, CA 93940

PH 1-888-MST-BUS1 (1-888-678-2871) • FAX (831) 899-3954 • WEB mst.org

November 25, 2022

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Transportation & Ops Manager
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Mr. Aaron Hernandez, Program Coordinator
55 Plaza Circle Suite B
Salinas CA 93901

Re: Measure X Grant proposal support letter

Dear Mr. Hernandez:

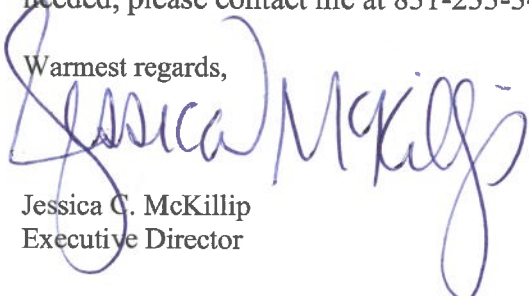
Independent Transportation Network Monterey County (ITN*MontereyCounty*) is grateful for the ongoing partnership with Alliance on Aging, who continues to provide outreach focused on transportation information and resources to residents particularly in rural areas of Monterey County.

ITN*MontereyCounty* is the only nonprofit 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 tenth year, we serve over 650 Senior and visually-impaired members and have delivered over 77,500 rides for any reason in our affiliate service area; to include medical appointments, grocery shopping, getting a haircut, going to church, and visiting friends or relatives in the hospital or at nursing facilities.

During the Measure X Cycle 2 grant period Alliance on Aging has been a critical ally in our rural community pilot projects launching; agreeing to collaborate as part of ITNAmerica's Federal Transit Administration funding project focused on rural transportation barriers and improving the proprietary Rides software, used by ITNAmerica affiliates. In 2021 ITN*MontereyCounty* relocated our offices to be one of six regional partners operating out of "The HUB", an Alliance vision of no wrong door for many years. Alliance on Aging successfully developed both sub-committees made up of regional community stakeholders and residents who assist with the development of our rural pilot projects; NorthLine and ValleyLine. Their staff has attended numerous events collecting survey data in rural communities, and the key referral initiating connections with three recently recruited volunteers- two willing to help in rural communities.

We are enthusiastic for our partnership with Alliance on Aging to expand further, not only for these rural pilot projects but others in the future. If any further information or clarification is needed, please contact me at 831-233-3447 or jessica.mckillip@itnmontereycounty.org.

Warmest regards,



Jessica C. McKillip
Executive Director