

MEMORANDUM

To: Tess Lengyel
From: Rachel Ede and Paul Supawanich, with the Nelson\Nygaard Technical Team
Date: December 2, 2009
Subject: Funding Opportunities for Accessible Transportation Services, Programs, and Research

This memorandum provides an overview of ten sources of service implementation funding, technical assistance, and volunteer support that are available to accessible transportation providers in Alameda County. These funding sources have been selected based on their direct relevance to accessible transportation programs and projects, and eligibility of public and non-profit accessible transportation or mobility services providers to access funds.

The programs included in this memorandum vary widely in terms of the size of potential awards and the type of resources provided. Most are competitive in nature, and many are very competitive given limited resources and strong interest from around the country. In addition, a few programs—while still active—are currently delaying calls for projects pending resolution of federal or state funding processes. These characteristics and issues are discussed for each of the selected programs, along with basic information for potential applicants.

It should be noted that funding for accessible transportation is by no means limited to these sources. Other key sources of funds include programs that ACTIA and its grantees are already familiar with, including the federal New Freedom and 5310 programs. In addition, accessible transportation improvements could be eligible for funding as part of larger projects meeting the goals of important federal, state and local funding programs such as MTC's Transportation for Livable Communities program, or the Bay Area Air Quality Management District's Transportation Fund for Clean Air. Finally, while several local and national foundations reviewed during preparation of this memorandum were not currently focusing grant-making in areas related to transportation or mobility, resources may be available for accessible transportation projects at some point in the future.

The resources discussed in this memorandum are divided into three sections: 1) Funding Support for Transportation and Mobility Services, 2) Technical Assistance Opportunities, and 3) Volunteer Support.

Funding Support for Transportation and Mobility Services

This section describes four sources of funds supporting operation of transportation or transportation-related projects and programs for seniors and people with disabilities. These include:

- MTC Lifeline Transportation Program
- NCST Senior Transportation Demonstration Funding
- Archstone Foundation
- Beverly Foundation STAR Awards

Older Americans Act Title IIIB funds for Supportive Services are also discussed, though these funds are not currently made available to support transportation services in Alameda County. Nonetheless, we have chosen to include a brief discussion of this source as the Older Americans Act is an important source of funding for senior transportation in many communities, and funds may be available from this source at some point in the future.

Older Americans Act Funds (Not Currently Available)

The Older Americans Act (OAA) provides funding to support a range of assistance programs aimed at seniors age 60 and older, especially those at risk of losing their independence. Transportation is a permitted use of funds under the Act, providing needed access to nutrition and other services offered by the federal Administration on Aging, as well as to medical and other essential services required by an aging population. No funding is specifically designated for transportation. However, funding can be used for transportation under several sections of the OAA, including Title III (Support and Access Services), Title VI (Grants to American Indian Tribes), and the Home and Community-Based Services (HCBS) program. Title IIIB (Supportive Services) in particular is a key source of senior transportation funding in many parts of the country.

In Alameda County, OAA funds are administered by the Alameda County Area Agency on Aging (AAA). No funding is currently provided for transportation. Funding is provided for a range of other Supportive Services areas—such as case management and legal services—using the nearly \$700,000 the agency receives under this title. In light of recent funding cuts, the AAA does not plan to expand its funding areas in the upcoming Supportive Services RFP, to be issued in January 2010. Because the RFP will cover a four-year period, allocation of OAA funding for senior transportation in Alameda County is unlikely in the short-term.

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MTC Lifeline Transportation Program

The Lifeline Transportation Program is sponsored by the Metropolitan Transportation Commission (MTC), the regional transportation planning agency for the San Francisco Bay Area, and is administered locally by each Congestion Management Agency (CMA). In

Alameda County, the Alameda County Congestion Management Association (ACCMA) serves as the administrator of Lifeline funds. Projects selected by the ACCMA are then forwarded to MTC for adoption and release of funding.

The Lifeline Transportation Program is intended to fund projects that result in improved mobility for low-income residents, but also considers the specific needs of seniors and people with disabilities. The Lifeline Program supports community-based transportation projects that:

- Are developed through a collaborative and inclusive planning process that includes broad partnerships among a variety of stakeholders such as public agencies, transit operators, and community-based organizations, as well as outreach to underrepresented stakeholders.
- Address transportation gaps or barriers identified in Community-Based Transportation Plans (CBTPs)—including the MTC-sponsored CBTPs available on the MTC website—or strategies emerging from countywide or regional welfare-to-work transportation plans, the Bay Area’s Coordinated Public Transit-Human Services Transportation Plan (also available on MTC’s website), or other documented needs assessments.
- Improve the range of transportation choices by adding new or expanded services such as enhanced fixed-route transit services, shuttles, children's programs, taxi voucher programs, improved access to autos and capital improvement projects.

Transportation needs specific to elderly and disabled residents of low-income communities may also be considered when funding projects. Existing transportation services may also be eligible for funding.

The Lifeline Program is somewhat complex due to the composition of its funding sources. The program is composed of three funding sources: State Transit Assistance (STA), Proposition 1B transit funds, and the Federal Transit Administration’s Job Access and Reverse Commute (JARC) Program. This combination of funding sources can create confusion in regard to eligible uses of funds and other requirements. Further detail about eligible uses of funds is available on the MTC website. Applicants and projects must be eligible for at least one or more of the funding sources.

Funding cycle: Due to recent budget volatility, the third cycle for Lifeline funds is currently on hold awaiting further information on funding sources. However, this cycle is still planned for the future. In the past, the Lifeline Transportation Program has been offered on a two- to three-year cycle. Funding from the second cycle has been programmed for FY 2009-2011.

Eligible uses of funds: Both capital and operating projects are funded, consistent with the requirements of the funding sources comprising the Lifeline Program

Eligible applicants: Public agencies, transit operators, county social service agencies, cities and counties, and private operators of public transportation services. Nonprofits are directly eligible for JARC funds, and can partner with an eligible STA recipient (a public transit agency) to receive STA funds.

Required match: The Lifeline Program requires a minimum match of 20% of the total project cost, with two exceptions. Operating projects funded by JARC funds require a 50% match. STA funds may be used to cover the 30% difference in match requirements if projects are eligible for both funding sources. All auto-related projects require a 50% match. Full detail regarding match requirements is available on the MTC website (listed below).

Lifeline Fund Source	Required Match
STA	20%
Prop 1-B, Transit	20%
JARC (Job Access Reverse Commute)	50% for operating projects (may use STA funds to cover up to 30% if project is eligible for both JARC and STA) 50% for auto projects 20% for capital projects

Contact: Diane Stark, Senior Transportation Planner
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Website:
<http://www.mtc.ca.gov/planning/lifeline/>

NCST Senior Transportation Demonstration Funding

The National Center on Senior Transportation (NCST) is a collaborative effort between Easter Seals and the National Association of Area Agencies on Aging (n4a). Its mission is to increase transportation options for older adults and enhance their ability to live more independently within their communities throughout the United States.

The Senior Transportation Demonstration Funding program was created by the NCST to help identify new ideas and program innovations to further older adult mobility. Funds are targeted to projects and programs that expand transportation options for older adults, simplify older adults' access to transportation services, or increase the quality of transportation services for older adults. Grantees are expected to work to increase coordination of transportation services for older adults in their communities by fostering connections between aging services and transportation providers. Examples of programs that qualify for funding include (but are not limited to) those that address driver safety, transitioning from driving to other modes, pedestrian access, and public transportation.

In addition to receiving funding to support initiation of selected programs, program sponsors are also eligible for one year of technical assistance from NCST to further develop their plans.

The grants for this program have ranged from \$35,000 to \$90,000. Applicants from Alameda County would compete with projects and program from around the country. During the

2008-2009 funding cycle, over 320 applications were received and eight projects were ultimately funded.

Funding cycle: As of November 2009, the NCST Demonstration Funding Program call for projects is on hold, awaiting potential for federal funds that would expand the current fund base. It is unclear when the call will be opened.

Eligible use of funds: As discussed above, funds are available to support a wide range of projects and programs that expand or improve senior transportation or transportation access. Funding priorities established thus far include mobility management, diversity issues (meeting the transportation needs of specific cultural, ethnic or rural populations), and the correlation between access to mobility options and health care outcomes and cost.

Eligible applicants: Government and non-profit entities

Required match: Typically, there has been no required match for grants; however the steering committee has yet to draft the guidelines for the next round of applications, which will depend heavily on guidance from the FTA.

Contact: Lynn Winchell-Mendy, Technical Assistance Associate
National Center on Senior Transportation
(202) 872-0888
lwinchell-mendy@n4a.org

Website:

http://seniortransportation.easterseals.com/site/PageServer?pagename=NCST2_about_projects_demo_grants

Archstone Foundation

The Archstone Foundation is a private grantmaking organization whose mission is to help prepare members of the aging population to be independent and meet their needs as they grow older. In 2008 and 2009, the majority of grantmaking was focused on three initiative areas: Fall Prevention, Elder Abuse and Neglect, and End-of-Life Issues. While accessible transportation does not fall directly within these initiative areas, funding for transportation and mobility-related projects is available through the Foundation's Responsive Grantmaking area, which directs resources to "emerging and unmet needs within the field of aging." The following are some examples of transportation and mobility-related project areas that the Foundation may consider funding through Responsive Grantmaking:

- Access to Care
- Disability Services
- Healthy Aging
- Professional Education and Training
- Promoting Aging in Place
- Transportation

In recognition of the source of the Foundation's endowment, the Foundation gives priority to proposals serving the Southern California region. However, proposals from outside Southern California may be considered if they serve the state as a whole, are demonstration projects with potential for replication in California, or have a regional or national impact. Projects that have the potential to improve practice in the field may also be considered.

Funding cycle: Ongoing. To apply for funding from the Responsive Grantmaking category, applicants must submit a letter of inquiry providing basic information about the proposed project or program. Letters are reviewed monthly, and applicants may be requested to submit a full proposal for funding consideration. Information about submitting a letter of inquiry under the Responsive Grantmaking category is available on the Foundation's website.

Eligible use of funds: Projects or programs that are consistent with the Foundation's funding priorities.

Eligible applicants: Primarily 501(c)(3) non-profit organizations serving older adults, though government-sponsored projects may also be considered.

Required match: Typically, there is no required match, although it may depend on the amount of funds requested.

Contact: Archstone Foundation
401 E. Ocean Blvd., Suite 1000
Long Beach, CA 90802
(562) 590-8655
archstone@archstone.org

Website:

http://www.archstone.org/info-url_nocat2293/info-url_nocat_show.htm?doc_id=260749

Beverly Foundation STAR Search/STAR Awards

The Beverly Foundation is non-profit operating foundation that undertakes research, demonstration projects, and technical assistance to facilitate mobility and transportation services meeting the needs of older adults. The Foundation initiated the STAR program in 2000 to help grow the knowledge base related to transportation options for seniors. Since that time, the foundation has administered an annual survey known as the STAR Search which includes a wide variety of questions related to the provision of senior transportation services. Since its inception, the database that has resulted from the STAR Search has steadily grown and is a major data resource on transportation options for older adults. The Beverly Foundation also uses the information gathered through the STAR Search to highlight survey respondents, their achievements, and progress, among other characteristics.

Any organization that submits a STAR Search survey is eligible for a STAR Award. STAR Awards recognize outstanding transportation programs for seniors. Awards for Excellence provide a \$10,000 prize while \$5,000 is awarded STAR Special Recognition Award recipients. In 2008, the Foundation awarded a total of approximately \$50,000 in STAR Awards. (Eight awardees were selected from a pool of 103 applicants.)

The STAR Search survey is available on the Beverly Foundation website, and is targeted specifically to agencies and organizations operating STPs (Supplemental Transportation Programs for seniors). To participate in the survey and the STAR Awards process, organizations must be a member of the Foundation's STP Exchange. Membership is free and available at www.stpexchange.org. All STP Exchange members are notified when the STAR Search survey becomes available each year.

Funding cycle: Annual. The STAR Search survey process for 2009 has already concluded. For the 2008 cycle, award recipients were announced in September, with the selection process occurring over the preceding two months.

Eligible use of funds: Awards are given to programs of excellence, including community based programs, that provide transportation to older adults. A strong emphasis is place on creativity and innovation.

Eligible applicants: Any operating transportation service—either in a human service or senior service organization, or paratransit/transit agency—is eligible for to participate in the STAR Search and STAR Awards process. As discussed above, applicants must complete the STAR Search survey, and to do so, must be members of the Beverly Foundation's STP Exchange.

Required match: None.

Contact: Helen Kerschner, Executive Director
Beverly Foundation
1120 Pennsylvania Street NE
Albuquerque, NM 87110
(505) 222-0620
hkerschner@beverlyfoundation.org or info@beverlyfoundation.org

Website:
<http://www.beverlyfoundation.org/awards/index.html>

Technical Assistance Opportunities

In addition to funding opportunities for implementation or operation of transportation services, technical assistance and research support is also available. Sources of technical assistance grants or funding for student research projects include:

- NCST University Student Scholars Program
- Easter Seals Project ACTION Student Research Fellowship in Accessible Transportation
- Easter Seals Project ACTION/NCST Mobility Planning Services Institute (includes Accessible Community Transportation Institute and Senior Transportation Institute)
- NCST Senior Transportation Technical Assistance

NCST University Student Scholars Program

The NCST University Student Scholars Program is a research grant that is administered annually to university students who are interested in research topics involving transportation and mobility relating for older adults. This program can award up to \$2,000 to an individual to provide support for their research projects or travel to help analyze their findings. The final research deliverable is shared with the public via the NCST library.

Each year, a specific initiative is selected and serves as the priority for funding decisions. For 2009-2010, the following specific initiatives were selected, several of which may have particular relevance to Alameda County:

- Cultural and ethnic diversity
- Rural/frontier/tribal transportation for older adults
- Access to mobility options and health status/healthcare costs
- Program start-up and development
- Travel Training
- Mobility Management

Generally, the program may help organizations and governments produce ideas and solutions related to issues that need further investigation and/or academic research. The 2009-2010 program is currently open and will be accepting applications through December 17, 2009.

Eligible use of funds: University student applicants have considerable flexibility in their project. Examples of final products might include, but are not limited to, research reports, articles prepared for submission to refereed journals or professional publications, and tools, instruments, or training curricula for use by aging network, human service, and transportation providers.

Eligible applicants: University students currently enrolled in academic coursework

Required match: There is no required match

Contact: Lisa Tucker, Project Coordinator and Training and Technical Assistance Specialist
National Center on Senior Transportation
(866) 528-6278
ltucker@easterseals.com

Website:

http://seniortransportation.easterseals.com/site/PageServer?pagename=NCST2_about_projects_student_projects

Easter Seals Project ACTION Student Research Fellowship in Accessible Transportation

In cooperation with the Council of University Transportation Centers (CUTC), Easter Seals Project ACTION (ESPA) offers awards of \$5,000 to post-baccalaureate students in the CUTC network to support research projects related to accessible transportation. (The CUTC

network includes over 70 universities, including U.C. Berkeley and San Jose State University in the Bay Area.) Fellowships are intended to leverage a project report on a topic related to public transportation accessibility or the impact of public transportation on people with disabilities that can be submitted for publication by transportation-related journals. ESPA selects a co-author for this publication.

Eligible use of funds: There is flexibility in the use of funds with the stipulation that the research project must result in a manuscript suitable for publication in academic journals or professional publications related to accessible transportation. Applications must be consistent with ESPA goals, including assisting with implementation of the ADA, advancing creation and use of coordinated accessible community transportation services, increasing awareness and use of accessible transportation, eliminating barriers to transportation access in the pedestrian environment, and facilitating independent travel options for people with disabilities.

Eligible applicants: Post-baccalaureate students enrolled in a CUTC network program.

Required match: There is no required match.

Contact: Ken Thompson
Easter Seals Project ACTION
(800) 659-6428
kthompson@easterseals.com

Website:
http://projectaction.easterseals.com/site/PageServer?pagename=ESPA_projects_cutc

NCST/Project ACTION Mobility Planning Services Institutes

Unlike other funding sources described in this memo, the Project ACTION and NCST Mobility Planning Services Institutes enable project teams to meet with experts and peers within the field to discuss local transportation issues and develop potential solutions. There are two Institutes: an Accessible Community Transportation Institute and a Senior Transportation Institute. The Institutes have been offered annually. Selected teams travel to Washington D.C. (expenses paid) to attend a three-day institute that involves an intensive planning and consultation process as well as break-out sessions on topics such as marketing, advocacy, and service coordination. The Institute is followed by 12 months of ongoing technical assistance from Project ACTION or NCST.

This program is geared towards projects or issues that require further technical assistance and project sponsors who wish to be engaged in the development of a solution. Benefits of the Institute include the ability to dialogue with experts in the field and other project sponsors who may be facing similar issues. Teams involved in the Institute can range from 3-5 people and do not necessarily need to be fully composed of members of the implementing agency. Recommendations for suggested team members are provided on the Mobility Planning Services Institute webpage.

Funding cycle: Annual. The 2009 application process closed in early April 2009, with the Institutes held in June.

Eligible use of funds: Program does not provide direct funding; however participants receive free lodging, meals, and air and ground transportation for travel to the Institute if selected.

Eligible applicants: City/government staff, civic leaders, accessible transportation consumers, volunteers.

Required match: Participants must be able to travel to Washington DC during the time of the Institute.

Contact: Accessible Community Transportation Institute
Penny Everline, Training and Technical Assistance Specialist
Easter Seals Project ACTION
(800) 659-6428
peverline@easterseals.com

Senior Transportation Institute
Lisa Tucker, Training and Technical Assistance Specialist
National Center on Senior Transportation
(866) 528-6278
ltucker@easterseals.com

Website:

http://projectaction.easterseals.com/site/DocServer/MPSI_PDF.pdf?docID=85403

NCST Senior Transportation Technical Assistance

In addition to the resources highlighted above, the NCST also provides grants for technical assistance. In the past, applicants who had applied for the NCST Senior Transportation Demonstration funding—but were not awarded demonstration funds—were eligible for technical assistance grants. (Each of 11 top-ranked 2008 demonstration funding applicants was awarded \$10,000 and four months of tailored technical assistance from NCST staff.) NCST does not have a second call for projects scheduled at this time, but may provide technical assistance grants again in the future.

In addition to providing grants, the NCST has developed a set of workshops that cover some of the most frequent technical assistance topics. These workshops are held via conference call and cover issues such as volunteers and volunteer administration, marketing, evaluation, among other topics. A schedule of these workshops can be found on the NCST website.

Funding cycle: NCST does not have a second call for projects scheduled at this time, but may provide technical assistance grants again in the future.

Eligible use of funds: Technical assistance and support for senior transportation projects and programs.

Eligible applicants: Past recipients have included transit agencies and public and non-profit agencies including social and human services organizations.

Required match: N/A

Contact: Lucinda Shannon, Training and Technical Assistance Specialist
National Center on Senior Transportation
(866) 528-6278

Website:

http://seniortransportation.easterseals.com/site/PageServer?pagename=NCST2_about_projects_TA_grants

Support for Volunteers

This section outlines a pair of programs that provide resources supporting older adult volunteers and workers. These programs match older adults who are looking to stay active through volunteering or are seeking employment with agencies and organizations that require assistance. These programs are a potential source of volunteer support for service delivery for accessible transportation providers in Alameda County.

Retired Senior Volunteer Program (RSVP)

The RSVP program is one of three programs administered by Senior Corps, a program of the Corporation for National and Community Service that matches individuals 55 and over with volunteer experiences that best fit their experiences and interests. Nationally, the RSVP program provides approximately 500,000 senior volunteers with orientation, training, and supplemental insurance to support their volunteer efforts.

Volunteers in the RSVP program may be matched with a variety of programs. These could include efforts to provide or support senior mobility or transportation services. Locally, the RSVP program is coordinated through the San Francisco and Alameda County chapter. This group has matched volunteers with over 80 local organizations. To register to request volunteers, agencies or organization should contact RSVP for San Francisco & Alameda Counties directly through the contact information below. A form for requesting volunteers can also be filled out on the RSVP website listed below. Individuals who are interested in volunteering through the RSVP program can visit the website to see the various available opportunities.

Eligible use of funds: N/A—volunteers can support service provision.

Eligible applicants: Volunteers must be 55 years or older. Local programs requesting volunteers are evaluated by RSVP for San Francisco & Alameda County.

Required match: Training and orientation provided by volunteers' host agency or organization.

Contact: Scott Weinzirl
RSVP for San Francisco & Alameda Counties

1611 Telegraph Avenue, Suite 302
Oakland, CA 94612
(510) 452-0868
rsvpinfo@ncphs.org
<http://www.rsvpsf.org/>

Senior Community Service Employment Program (SCSEP)

Funded through the Older Americans Act, the SCSEP Program (pronounced “C-SEP”) is a community service and work-based training program for lower-income workers 55 and older. This program was originally established in 1965 to provide part-time, community service work based training for individuals who may otherwise have low prospects for obtaining employment.

The individuals who participate in the SCSEP Program are provided with a variety of supportive services, such as personal and job-related counseling, job training, and job referral. Participants receive job-related training in preparation for their community service assignments at local public or non-profit community service agencies. SCSEP work experiences are not meant to be permanent, but instead a bridge to other jobs that are not supported with federal funds.

In Alameda County, SCSEP funding is received both by the Area Agency on Aging and by the City of Oakland (in the case of the City of Oakland, through a contract with Senior Service America, a non-profit organization administering federal Department of Labor funds). The Area Agency on Aging passes SCSEP funding through to Self Help for the Elderly (in Hayward), which implements a relatively small SCSEP program for individuals in central and southern Alameda County. The City of Oakland implements a much larger SCSEP program—focused on North County—through its ASSETS program. Agencies that are interested in becoming SCSEP host agencies should contact either Self Help for the Elderly or ASSETS at the contact information below.

Eligible use of funds: N/A – participants can assist with service provision.

Eligible applicants: California residents age 55 or older who have an income that does not exceed 125% of the federal poverty level (\$13,000 annually). Potential program participants can complete an online income eligibility calculator to determine if they meet income requirements for this program. The calculator is available at the website listed below.

Required match: Training and orientation provided by volunteers’ host agency or organization.

Contact: ASSETS
Faheem Salaam
150 Frank H. Ogawa Plaza, Suite 4353
Oakland, CA 94612-2092
(510) 238-3535

Self Help for the Elderly (Hayward office)

Gloria Hung
24100 Amador St. 3rd Floor
Hayward, CA 94544
(510) 265-8267

Alameda County Area Agency on Aging
Lisa Ho
6955 Foothill Blvd #300
Oakland, CA 94605
(510) 577-3531

Websites:

<http://www.aging.ca.gov/programs/scsep.asp>

<http://www.selfhelpelderly.org>