



Specialized Transportation Grant Program

Cycle 13 Call for Projects

Organization Application

1 Applicant General Information

Applicant Legal Name	Travelers Aid Society of San Diego
DBA (If Applicable)	Travelers Aid San Diego
Applicant Address	2615 Camino del Rio S., Suite 103 San Diego, CA 92108
Contact Name	Marcy Roke
Title	President & CEO
Phone	619-295-8393, ext. 317
Email	marcy@travelersaidsandiego.org

2 Applicant Background

In 200 words or fewer, provide background information on the Applicant, including its mission statement.

The mission of Travelers Aid Society of San Diego is *providing connections and solutions that prevent or address crisis*. As an agency focused on San Diego's most vulnerable populations, Travelers Aid has been operating since 1901, and was chartered and incorporated as a 501(c)3 nonprofit organization in 1914. We offer over 120 years of experience operating social service programs that all have transportation at their core. Most of our current social service programs focus on the transportation needs of very low-income older adults and individuals with disabilities.

Travelers Aid also provides information and referral services to visitors to the San Diego Region through volunteer-staffed information booths at transit centers; and provides case management, information and referrals, and ancillary services to homeless individuals and families at a satellite office at St. Vincent de Paul. We offer transportation and wrap-around services for survivors of domestic violence in a program called *Journey to Safety*.

In 200 words or fewer, provide background information on the Applicant's transportation program, including how it aligns with the STGP Goal and Objectives.

Travelers Aid's social service transportation programs include: *SenioRide*, helping low-income seniors to overcome isolation by providing a menu of free transportation options; *RIDEFinder*, providing low-income seniors and individuals with disabilities with transit planning, travel training, and information & referrals; *Senior Solutions*, providing low income immunocompromised seniors and individuals with disabilities with free, safe one-on-one (1:1) transportation options for medical visits including dialysis and cancer treatments; *Homeless Services*, providing homeless individuals and families with referrals to available resources, homeless certifications, identification, and necessary transportation services for medical and legal appointments; and *Journey to Safety*, assisting survivors of domestic violence with transportation to places of safety.

Our work aligns with the STGP Goals and Objectives by offering programs that improve mobility for older adults and individuals with disabilities by delivering transportation solutions which meet identified gaps in the current field of options. We have the capacity and experience to continue to operate our successful programs as well as create new and innovative responsive programs.

In a few words, how did you learn about this Call for Projects?

Grants distribution emails and newsletters, transportation-related meetings, SANDAG Transportation Committee, SSTAC, etc.

3 Applicant Eligibility Information

Type of Applicant	☒ Private nonprofit organization ☐ State or local governmental agency, including local jurisdictions and operators of public transportation
Employer Identification Number	95-1727674
Unique Entity Identifier (Section 5310 Applicants only)	MF9ALET1J33

Provide the Applicant's completed W-9 Form as **Attachment 1**. If the Applicant is a Private Nonprofit Organization, provide an Entity Status Letter demonstrating that the Applicant is currently in good standing with the State of California Franchise Tax Board as **Attachment 2**. See the Application Materials for instructions. If the Applicant is a governmental agency, do not submit Attachment 2. If the Applicant is neither a Private Nonprofit Organization nor a governmental agency, do not continue this application; the Applicant is ineligible.

3.1 Total Grant Funding Requested by Applicant (All Proposed Grants)

Section 5310	Senior Mini-Grant	Total
\$400,000	\$820,000	\$1,220,000

4 Applicant Financials and Audits

If the Applicant has had a Single Audit completed within the past three years, provide the Applicant's most current Single Audit as **Attachment 3**. If the Applicant has not had a Single Audit completed within the past three years, provide the Applicant's most recent Audited Financial Statement, which includes a Statement of Balance Position (Balance Sheet) and Statement of Activities (Income Statement), as **Attachment 3**. If the Applicant does not have an Audited Financial Statement, provide the Applicant's most current Un-audited Financial Statement, which includes a Statement of Balance Position (Balance Sheet) and Statement of Activities (Income Statement), as **Attachment 3**.

5 Board Policy No. 035 Resolution

Per **SANDAG Board Policy No. 035**, all applicants are required to submit a resolution from the Applicant's governing body that:

1. Commits the Applicant to provide the amount of matching funds per project that adheres to the Minimum Match Percentage
2. Authorizes Applicant's staff to accept the grant funding and execute a grant agreement if an award is made by SANDAG.

Applicants must submit this resolution by the deadline specified in Board Policy No. 035. See the Timeline in the Call for Projects. Failure to provide a resolution that meets the requirements may result in the application being deemed nonresponsive. A Board Policy No. 035 resolution template is available in the Application Materials for this Call for Projects.

If the Applicant wishes to submit its Board Policy No. 035 resolution with its Application by the Application Submission deadline, provide the completed and signed resolution as **Attachment 4**. If the Applicant does not submit its Board Policy No. 035 resolution by the Application Submission deadline but wishes to submit it before the deadline specified by Board Policy No. 035, email it to grantsdistribution@sandag.org.

6 Traditional Section 5310 Project Resolution

If the Applicant is a state or local governmental agency requesting funds for one or more traditional Section 5310 projects, provide documentation as **Attachment 5** that the Applicant either:

1. is approved by the State of California to coordinate services for seniors and

individuals with disabilities; or

2. certifies by resolution that there are no Private Nonprofit Organizations readily available to provide the proposed service.

A traditional Section 5310 project resolution template is available in the Application Materials for this Call for Projects. Applicants submitting this resolution are strongly encouraged to use this template.

7 Required Forms

Complete, sign, and submit all applicable required forms as **Attachment 6**. These forms are available as a packet entitled Required Forms and are included in the Application Materials for this Call for Projects.

8 Federally Negotiated Indirect Cost Rate

If the Applicant has a Federally Negotiated Indirect Cost Rate (FNICR) and wants to apply its FNICR to a proposed project, the Applicant must provide documentation from the Applicant's federal cognizant agency approving the Applicant's FNICR as **Attachment 7**. Applicants that do not have an FNICR should not submit an Attachment 7.

9 Transit Asset Management Questions

Mark Yes or No to the following question(s) to help SANDAG determine if the Applicant is required to participate in a Transit Asset Management (TAM) Plan if awarded funding. See Section 3.2 of the Call for Projects for information on TAM requirements.

For Transit Operator Applicants (Metropolitan Transit System and North County Transit District)

Question	Mark Yes or No
1. Does the Applicant have a current and compliant individual TAM Plan?	☐ Yes ☐ No

For All Other Applicants

Question	Mark Yes or No
1. Is the Applicant requesting Section 5310 funds through this Call for Projects?	☒ Yes ☐ No
2. Does the Applicant own, operate, or manage capital assets used to provide "public" transportation services, rather than "client-based" transportation services?	☒ Yes ☐ No

10 Applicant Risk Assessment Questionnaire

Please complete the following Applicant Risk Assessment Questionnaire to help SANDAG complete its Pre-Award Risk Assessment as discussed in Section 5.5 of the call for projects:

<https://forms.office.com/g/WuVwAHvVut>

The results of the pre-award risk assessment may inform the level of monitoring SANDAG conducts of awarded Applicants.



Specialized Transportation Grant Program

Cycle 13 Call for Projects

Section 5310 Operating Project Application

1 Applicant and Project Names

Applicant Name	Travelers Aid Society of San Diego
Project Name	Senior Solutions 5310

2 Project Manager and Grant Signatory Contact Information

List the Project Manager (PM) who will maintain overall responsibility of the project for the Applicant.

Individual Name	Marcy Roke
Title	President & CEO
Phone	619-295-8393 ext. 317
Email	marcy@travelersaidsandiego.org

List the Signatory who, as a duly authorized representative of the Applicant, will sign the Section 5310 Grant Agreement for the Applicant.

Individual Name	Marcy Roke
Title	President & CEO
Phone	619-295-8393 ext. 317
Email	marcy@travelersaidsandiego.org

3 Project Financial Summary

3.1 Grant Request, Match Amount, and Match Percentage

Grant Request	Match Amount	Total	Match Percentage	Minimum Match Requirement
\$200,000	\$200,000	\$400,000	50%	50%

3.2 Source(s) of Matching Funds

Describe the source(s) of matching funds that will be applied to this grant. Contact SANDAG staff if there are more than five sources of matching funds. If the Applicant includes in-kind contributions as a source of matching funds, the Applicant must document how the fair market value of those in-kind goods and services was derived in the Budget Justification.

Match Source Number	Description of Matching Funds Source	Amount
1	In-Kind: Volunteer Driver Hours	\$68,000
2	City of San Diego Senior Solutions CDBG Program	\$122,000
3	American Cancer Society	\$10,000
4		\$
5		\$
Total		\$200,000

4 Coordinated Plan Eligibility Requirement

To be eligible for STGP funding, a project must be derived from the SANDAG 2020 Coordinated Plan.

4.1 2020 Coordinated Plan Very High and High Priority Strategies

Please check the box(es) indicating the Very High or High Priority strategy(ies) in the SANDAG 2020 Coordinated Plan from which the project is derived (select all that apply):

Very High

- ☒ Maintain existing effective and efficient transportation services
- ☒ Continue providing existing curb-to-curb, door-to-door (and door-through-door, when necessary) services for trips such as non-emergency medical

transportation and grocery shopping in circumstances where paratransit is insufficient, inappropriate, or unavailable

- ☐ Maintain assets in a state of good repair
- ☐ Develop or expand transit or transportation solutions in areas with little or no other transportation services based on identified gaps
- ☒ Develop or expand transit or transportation solutions in areas with sufficient densities to support specialized transportation or coordinated services based on identified gaps.
- ☒ Provide new curb-to-curb, door-to-door (and door-through-door, when necessary) services for trips such as non-emergency medical transportation and grocery shopping, in circumstances where paratransit is insufficient, inappropriate, or unavailable
- ☐ Increase interagency coordination efforts to maximize existing capacity
- ☐ Increase interagency coordination of resources
- ☒ Improve access to available services through coordination and enhanced customer service that connects riders to transit or specialized transportation services that most appropriately meet their needs

High

- ☐ Improve first-mile/last-mile strategies to better connect to transit
- ☐ Increase work-based transit service hours of operation to assist nontraditional work schedules
- ☐ Increase the level of service on fixed-route services
- ☐ Implement interagency partnerships to secure funding
- ☒ Develop public-private partnerships to provide innovative transportation solutions
- ☐ Provide educational resources to encourage more individuals to ride public transit
- ☐ Evaluate and upgrade transit stops and amenities where appropriate

4.2 2020 SANDAG Coordinated Plan: Explanation of Derivation

Briefly explain how the proposed project is derived from the selected priority strategy(ies).

Senior Solutions seeks to address many of the very high and high priority strategies listed in the 2020 Coordinated Plan by supporting some of the most vulnerable people in our community (those with immunocompromised conditions who are 65+ and/or living with a disability) with free individualized and accessible transportation options for critical medical appointments and essential trips.

The above strategies highlight the need for solutions in the San Diego region, and *Senior Solutions* can address a number of them by identifying these high-need

individuals and then ensuring their transportation needs are met appropriately. Both “Maintain existing effective and efficient transportation services” and “Continue providing existing curb-to-curb, door-to-door (and door-through-door, when necessary) services for trips such as non-emergency medical transportation and grocery shopping in circumstances where paratransit is insufficient, inappropriate, or unavailable” is met through utilizing volunteer drivers and rideshare services. We develop “public private partnerships to provide innovative transportation solutions” to further enhance our program offerings.

5 Project Service Area and Title VI Questions

Per Section 5310 requirements, the proposed project must be within the large, urbanized area of San Diego County to be eligible for Section 5310 funding through SANDAG. Per federal Title VI requirements, SANDAG must determine if the proposed project will use Section 5310 funds to provide assistance to predominantly people of color¹ in the proposed project service area.

SANDAG has developed an [Applicant Mapping Tool](#) to help applicants generate a project service area map and gather demographic data on the project service area. See the Applications Materials for instructions on using the Applicant Mapping Tool. Provide a screenshot or screen clip of the project service area map and the CSV file of the demographic data generated through the Applicant Mapping Tool. Provide these two files as **Attachment 8** and answer the following questions:

1. Is the proposed project within the large, urbanized area of San Diego County?	☒ Yes ☐ No
2. What is the total population in the project service area?	3,061,533
3. What percent of the total population in the project service area is people of color?	58.501%

6 Needs Accommodation Policy

The Target Population for Section 5310 projects is people 65 years of age and older and individuals with disabilities. Under the Needs Accommodation Policy, three requirements must be met for a project to be eligible for grant funding:

1. Project is specifically designed to meet the special needs of the Target Population
2. At least 80% of the project’s beneficiaries are members of the Target Population
3. Project benefits are prioritized for the Target Population

Complete the below table to indicate the number and percentage of those served by the proposed project.

¹ Refers to an individual who identifies as at least partly American Indian or Alaska Native, Asian or Pacific Islander, Black or African American, or Hispanic or Latino

Demographic Category	Number	Percentage of Total
Older Adults (65 and older)	0	0%
Individuals with Disabilities	70	20%
Older Adults and Individuals with Disabilities	280	80%
Neither Older Adults nor Individuals with Disabilities	0	0%
Total	350	100%

7 Project Narrative

General Instructions: Answer the following questions in the space provided. Unless otherwise stated, provide responses that are 250 words or fewer.

Applicant Experience, Capacity, and Readiness

1. To what extent does the Applicant have experience in successfully managing grant-funded transportation services benefiting the Target Population?

First established in 1901 and incorporated in 1914, Travelers Aid Society of San Diego has extensive experience managing multiple grants, including ones that provide transportation services to a variety of vulnerable/marginalized client populations. It has provided services successfully with federal grant funds, local City and County funds, SANDAG Specialized Transportation Grant funding (since 2009), and private foundation grants throughout its history. The organization has coordinated transportation with federal HUD providers and provided services and referrals to and from a large local network of social service agencies.

Through our *SenioRide*, *RIDEFinder*, and *Senior Solutions* programs, Travelers Aid has an established active client base of low-income older adults and individuals with disabilities totaling 1,784 (as of September, 2024). Our volunteer driver corps has 25 active drivers as of September. We have additional established client bases and referral relationships for other transportation programs as well (ones not funded via SANDAG, but through the City and County of San Diego, the American Cancer Society, and through private foundations and grants). All our social service programs are provided to our clients at no charge to them; our enrolled clients are extremely low or very low income as defined by HUD.

2. What is the Applicant's technical capacity for implementing the proposed STGP-funded service, including, but not limited to, sufficient staffing resources; data management and tracking capabilities; and policies and

procedures for ethics, third-party contracting, internal controls, financial management, and allowability of costs?

Travelers Aid began providing transportation services to individuals in San Diego in 1901. In its 123 years, Travelers Aid has assisted literally millions of people. *Senior Solutions* has been operating since 2021, and staffing resources are in place to successfully manage the program. Case Managers distribute transportation instruments and provide critical information to clients in need daily. The Operations Manager recruits and manages our volunteer corps. Management monitors the program's operations, plans distribution of resources, and creates monthly reporting. Responsible fiscal management is in place to invoice and track program expenditures and costs via QuickBooks. A cloud-based database of clients is maintained, and monthly reports are produced that indicate the numbers of people served and the amount and type of help received. Memorandums of Understanding (MOUs) are in place with vendors and partner agencies so that there are guidelines for our work and purchasing practices with them. Bulk buying programs are used to cost effectively purchase transportation assistance. Referrals are received and tracked through a database called the Community Information Exchange (CIE). An independent accounting firm produces monthly financial statements as well as quarterly IRS filings. An independent auditing firm conducts our annual audit. Financials are reviewed by our Board of Directors in bi-monthly board meetings.

A Title VI Plan provides policies for how clients, potential clients, and the public may understand their rights and have an avenue for resolution regarding our programs. We have written policies for document retention, client program usage, volunteer driver expectations, vendor grievances, sexual harassment, false claims, and background checks.

3. Is the Applicant fiscally stable and ready to begin the proposed service as soon as October 1, 2025, and maintain the proposed schedule so that it meets all proposed deliverables and ensures completion by the end of the grant term?

Travelers Aid is a small nonprofit with a staff of four full-time and two part-time employees (we propose adding one full-time staff member to our team) and we are careful about monitoring our expenses. Since we've been operating several programs for many years, we are accustomed to (and in a comfortable rhythm of) contracts that follow a reimbursement model (where expenses are often not reimbursed by funders for 2-3 months). We have diversified funding streams from multiple sources: contracts with SANDAG, the City of San Diego, the County of San Diego, the American Cancer Society, and separate foundation grants, as well as an annual fundraising event supported by several digital fundraising campaigns throughout each year. Four years ago, the organization received a large cash donation from a supporter who designated the contribution in her estate; this funding resides in a high yield CD account which provides both stability and a liquid emergency fund. Additionally, since our programs are diversified with multiple funding sources and contracts, we can manage our financial position even during times when reimbursements come in later than expected. We are also working with our bank to open a line of credit to serve as a backup when encountered with the inevitable ebbs and flows of grant funding.

We have a history of managing contracts specifically with SANDAG since 2009 and are proud to have consistently received high marks on program monitoring forms and desk audits. We invoice and submit reporting monthly to SANDAG for current grant contracts.

Need and Equity

4. What percentage of those served by the proposed service are members of the Target Population? **100%**

Instructions: Complete the Project Scope of Work and Section 6 of this Project Application to respond to this question.

5. Describe the project need. How are specialized transportation services in the proposed service area insufficient, inappropriate, unaffordable, or geographically unavailable?

The 2020 Coordinated Plan outlines identified gaps in transportation services within the County. There is an urgent, growing need for specialized transportation. The demographic of older adults is expected to grow to more than 25% of the region by 2050 and more than double in population size from 481,750 in 2018 to 1,019,803, according to the Coordinated Plan (Chapter 4). It also indicates that in 2018, 9.8% of the population of the SD region reported a disability, and that the population experiences additional challenges in finding reliable, appropriate, and affordable transportation options.

Transportation has been identified by multiple sources and studies as a critical social determinant of health (SDOH):

“Transportation barriers, which disproportionately affect individuals and families with low incomes, create access barriers to care and can be detrimental to long-term health.

- 21% of U.S. adults without access to a vehicle or public transit went without needed medical care last year. Individuals who lacked access to a vehicle but reported neighborhood access to public transportation services were less likely to skip needed care (9%).
- 5% of all U.S. adults reported forgoing healthcare due to transportation barriers.
- **Adults with a disability (17%) were more than three times as likely to report skipping care due to transportation concerns.”¹**

Current specialized transportation offerings in the region are more strained and over-subscribed than ever. Further, many programs that serve the target population require participants to pay a fare or a portion of the transportation cost or expect donations. For clients like ours, any payment requirement can deter them from accessing transportation, which in turn, affects their health and life expectancy.

¹ According to an RWJF Brief Entitled: “More than One in Five Adults with Limited Public Transit Access Forgo Health Care Because of Transportation Barriers” dated Apr-26-2023 | Smith LB, Karpman M, Gonzalez D, and Morriss S:

6. How will the proposed service uniquely and urgently meet one or more specialized transportation needs through the grant term?

Senior Solutions has been operating for 3+ years and was originally developed to address new transportation challenges that emerged during the COVID-19 pandemic. It has since become a valuable resource for hundreds of grateful immuno-compromised clients in the service area. We have developed public-private partnerships to provide innovative transportation solutions. One example is our partnership with Peninsula Shepard Center, where we will cover the membership fees of extremely low-income individuals in their transportation program as well as pay for their donation-based rides, relieving clients of the financial burden. Our volunteer driver program allows individuals throughout the service area to receive transportation assistance. Clients are paired with drivers, or can recruit their own, and once properly vetted by our staff, each driver is paid a vehicle stipend to help cover their fuel and vehicle wear and tear. This provides clients a direct say in their transportation options. While not every client has someone available to provide rides, we are continuously recruiting volunteers to expand the geographic availability of drivers to help meet the demand.

We currently serve 253 active clients, all of whom are 65+ and/or have a permanent disability, are extremely low income, and live within the Large Urbanized Area of SD County. They are offered a menu of free transportation options: volunteer driver rides, taxi scrip, rides with Uber/Lift, and private door-to-door service rides. This program is popular, well-subscribed, and has a growing client base; we recently established a wait list because the service is in demand. We provide an average of 904 one-way passenger trips per month and have provided 9,953 trips in the first 11 months of Cycle 12.

7. How will the proposed service benefit those in the Target Population that need it the most, ensure access for individuals with Limited English Proficiency, and respond to diverse populations (e.g., veterans, low-income people, people of color, federally recognized Native American tribes)?

Travelers Aid focuses on serving those who most need assistance. Serving the target population of older adults (65+) and those living with disabilities is met by ensuring that 100% of our clients are in not only those demographic groups, but *also* that they are extremely low income as defined by HUD. Thus, all current clients have a monthly income of less than \$2,664, and most have an average income of \$1,235. The program alleviates the financial stress of transportation costs for necessary trips, such as medical appointments, pharmacy trips, and grocery shopping. To effectively reach this population and meet clients where they are, Case Managers visit HUD buildings on a regular basis to present the agency's programs and enroll new clients.

We have a contract with Language Services Associates to ensure that individuals, regardless of their level of English proficiency, can access services in their primary and preferred language. Since we added this option, we've used the translation service to communicate with clients using 11 different languages. Additionally, we have all our materials (flyer, application, acceptance letter) translated into Spanish, which is the second most popular primary language spoken by our clients.

Our staff works in partnership with case management staff from the Veterans Administration to ensure that veterans are receiving services and attends outreach events with organizations that serve diverse populations with the goal of educating all potential clients so that they may enroll. Some examples are The San Diego Center for the Blind, The Karen Organization of San Diego, and the LGBT Center.

People of color represent 49% of *Senior Solutions'* current client base.

Operational/Implementation Plan

8. To what extent does the Applicant have a clear and feasible service plan to deliver effective, safe, and reliable service for passengers, which may include Innovative concepts and technology to be used in scheduling/dispatching trips?

Instructions: Complete the Project Scope of Work to respond to this question.

9. Please describe the protocols the Applicant has or would implement to keep passengers and drivers safe.

Keeping clients and volunteer drivers safe is paramount to Travelers Aid. Program staff complete an assessment of each client's mobility and transportation needs to recommend appropriate and safe vehicles/rides/referrals. Clients sign a Code of Conduct, Acknowledgement of Services, and Waiver as part of their application.

Travelers Aid has developed a Volunteer Driver Handbook which must be reviewed and signed by all Volunteer Drivers prior to providing rides to clients. It outlines the rules of the program, which includes the annual submission of current vehicle registration, insurance coverage, driver's license, and SANDAG Transit Asset Management (TAM) vehicle assessment. Drivers must also submit a clear DMV report/record as a condition of acceptance as a driver and must not appear on the State of California's Megan's Law website (registered sex offender search tool). Travelers Aid joined SANDAG and CAM (Council on Access and Mobility) subcommittee in 2021 to develop a Specialized Transportation Grant Program Code of Conduct document, which was deployed in the current Cycle 12. This Code of Conduct ensures that clients of any STGP-funded program can have clear expectations of service (and behavior) no matter which provider they use. Additionally, all volunteer drivers and program/administrative staff of Travelers Aid are background-checked annually. Travelers Aid has an account with IntelliCorp, the company we use for background-checking services. Clients of our program receive and sign a document when they enroll which describes the benefits and outlines the rules of the program as well; this is included with the Code of Conduct.

Stewardship of Public Funds

10. How do the proposed budget and Scope of Work demonstrate effective stewardship of public funds such that only necessary and reasonable expenses, tasks, and deliverables are proposed?

Instructions: Complete the Project Scope of Work and Budget to respond to this question.

11. To what extent does the Budget Justification thoroughly explain how each proposed cost was determined and is justified, describe how any passenger fares or fees are affordable, and discuss how the proposed cost per one-way passenger trip is justified given the proposed service?

Instructions: Complete the Budget Justification to respond to this question.

12. Has the Applicant secured, or will the Applicant secure, matching funds? Is/are the match source(s) stable?

Matching funds for the *Senior Solutions* project will come from the value of in-kind volunteer driver hours. Please see the accompanying Budget Justification document for additional details but the required match for our project of \$200,000 is anticipated to be partially met through the use of volunteer driver hours in the amount of \$68,000. This source of funding is secure as long as the program is approved for funding, as we already have more than 25 volunteer drivers who work regularly for the organization, and we are continuously recruiting more drivers.

The remaining required match of \$132,000 will come in-part from the American Cancer Society from whom we have received funding in FY2022, FY2023, FY2024, and FY2025. We expect the support to continue and have budgeted a conservative \$10,000. We have budgeted \$122,000 from the City of San Diego Community Development Block Grant program as well. This source provided funding for *Senior Solutions* in FY2021/FY2022, FY2024, and FY2025 (we expect renewed funding in FY26 and FY27 but have budgeted conservatively once again).

Potential sources of back-up match funding can come from the *SenioRide* Program (an Operating Program funded by a Senior Mini Grant). It is anticipated that a proportion of clients will be enrolled in both programs and will receive benefits from both. There is also the Travelers Aid General Fund and proceeds from our annual fundraising event.

Coordination and Outreach

13. Does the Applicant coordinate well with other specialized transportation providers in the proposed service area to address gaps in existing specialized transportation services, avoid duplicating cost-effective services, and enhance service delivery?

Instructions: Include three Letters of Support with the Project Application and provide a response below.

As a small organization, Travelers Aid leverages its resources through partnerships within the community. We are proud to be a founding member (along with Jewish Family Service, ElderHelp, Peninsula Shepard Center (PSC), and St. Madeleine Sophie's Center) of the *Coalition of San Diego Specialized Transportation Providers*, established in 2024 to present a united front in advocating for bringing additional transportation funding to the region and for the fair and equitable distribution of specialized transportation resources. The Coalition has both built and strengthened our partnerships with other organizations that serve similar populations and has enabled Travelers Aid to both enhance service delivery and initiate or refresh MOUs with member agencies.

We rely on involvement, collaboration, and support from our critical stakeholders: St. Vincent de Paul, VA, Salvation Army, Serving Seniors, FACT, ElderHelp, Jewish Family Services (JFS), Catholic Charities, LGBT Center, Alpha Project, Rescue Mission, Third Avenue Charitable Organization, New Day Urban Ministries, 211, Ride Yellow, Elder Protection Council, Aging and Independent Services, and Health & Human Services of SD County. We enjoy more extensive collaboration efforts with ElderHelp, JFS, PSC, On the Go/CARS, and Foundation for Senior Care to fill gaps within our respective programs.

Program staff meet monthly with MAPSS (Metropolitan Area Providers of Social Services) and the Coalition of SD Specialized Transportation Providers; and quarterly with CAM (Council on Access & Mobility) to facilitate coordination efforts. We also attend (and are voting members of) the Social Services Transportation Advisory Council (SSTAC), a SANDAG working group and are actively involved with the Age Well Transportation & Community Connections Team.

14. How has the Applicant involved members of the Target Population in the continued operation of the proposed service? If the proposed service is new, how will the Applicant involve members of the Target Population in the planning of this new service?

Senior Solutions has been operating since 2021, and we have continued to make improvements over the past 3+ years based on participants' feedback, such as most recently adding a text line option for clients to make trip requests. As the expressed needs of the target population shift, Travelers Aid remains flexible in what services are provided and adjusts accordingly to ensure that the most beneficial, popular, and cost-effective aspects of the program are being expanded.

To ensure there is a platform for *Senior Solutions* clients to weigh in on how the program operates and suggest improvements, annual surveys are conducted, clients are interviewed in person, and Case Managers are always open to informal feedback during their regular communication with participants. Additionally, management staff attend SANDAG's SSTAC (Social Services Transportation Advisory Council), SANDAG's Mobility Working Group, the County's Elder Protection Council, and MTS's ASAC (Accessible Service Advisory Committee)—since these meetings include public comment periods and unmet needs discussions, we are constantly learning about challenges and expectations from our target audience.

There is a current effort within the Travelers Aid Society Board of Directors to identify and elect a member of the target population for a board seat. A member with "lived experience" will be a valuable, educational, and informative voice on the board.

Environmental Responsibility

15. To what degree does the proposed service promote healthier air and reduce greenhouse gas emissions and vehicle miles traveled through zero-emission or low-emission vehicles, efficient routing and scheduling (e.g., grouping trips by similar origins and destinations), or other mechanisms?

Senior Solutions will be as environmentally responsible as possible, given the unique and specialized needs of its target population. Efficient scheduling of rides for clients without extra stops will help reduce greenhouse gas emissions, and our staff will recommend transportation options that use clean air vehicles whenever that is possible. Uber and Lyft "Green Mode" options will be selected for rides when our staff books rides directly for clients on their "concierge" platforms, and we will work with the On the Go/CARS platform team to prioritize those options for rides they book for our clients as well. Many of our current volunteer drivers have hybrid or electric vehicles, which will contribute to this goal as well.

In all its programs, Travelers Aid encourages digital communication and paperless reporting.

Proposed Performance Measures

16. What is the proposed Minimum Service Hours per Week?

Instructions: Complete the Project Scope of Work to respond to this question.

17. What is the proposed Cost per One-Way Passenger Trip (OWPT)?

Instructions: Complete the Project Scope of Work to respond to this question.

Performance Monitoring and Outcomes

18. What is the Applicant's plan to monitor the proposed service's performance, track passenger data, and strive for continuous improvement?

In *Senior Solutions*, every call, every request for assistance, every transportation instrument issued or ride booked is tracked using cloud-based spreadsheets that all employees have access to. Since every client who uses the program is enrolled through an application process, we capture demographics, addresses, and mobility needs. Every month, we report on the total number of one-way passenger trips, divided among the various transportation options we provide (volunteer driver trips, door-to-door trips, taxi trips, ride-share trips, etc.). We also track and report the total number of both active and inactive clients, the number of clients on waiting lists, and the number of active and inactive volunteer drivers. We receive monthly reports from Lyft, Uber, Foundation for Senior Care, and On the Go/CARS with ridership information as well. All of this data is required and/or encouraged by funding sources, including SANDAG, and informs our goal of striving for continuous improvements in service delivery.

Senior Solutions has evolved and changed since it was conceived to better meet the needs of our clients and fill both existing and newly identified gaps in San Diego's transportation sector.

19. What is the Applicant's plan to anticipate, prepare for, respond, and adapt to unexpected changes or sudden disruptions so that it can deliver reliable service with minimal trip cancellations caused by the Applicant?

Risks to our *Senior Solutions* program might include vendors or partners reducing/suspending/ending services, experiencing work stoppages, or unprecedented things like another global pandemic. One lesson learned during COVID-19 is that our programs must be flexible, and we must be able to operate from anywhere. Travelers Aid is set up to work completely digitally. All our systems and processes are stored in Dropbox servers, and our phone system is VOIP; we use a mobile app to answer and make calls from anywhere. Since most of our client communication is done over the phone, through the mail, or via text, any unexpected stay-at-home order would cause little disruption.

We've prioritized creating new and strengthening existing partnerships and have formalized many of these with Memorandums of Understanding; this way, if one vendor or service is suspended, stops, or experiences cost-prohibitive price increases or work stoppages, we can shift to accommodate our clients without disruptions.

Senior Solutions emphasizes our participants' autonomy, and some trips are coordinated independently, whether that's scheduling taxi rides or volunteer driver trips. Many rideshare trips are scheduled as "will-call"—where each client has the flexibility to activate their trips when they are ready to depart by clicking a link or calling a number. This feature gives control to the clients and reduces missed rides or "no-shows." Our staff offers travel training to minimize potential transportation issues through our *RIDEFinder* mobility management program, and staff are available during expanded business hours to address any issues that may arise in the moment. The preferred methods of communication for our target population are phone calls and mail; therefore, clients are notified with a written letter and a phone call to outline any future changes.

20. Describe the Applicant's system to receive input from passengers on the quality of the service and reasons for any repeated no-shows through surveys or other methods. How does or will the Applicant use this input to inform enhancements to service delivery?

Client satisfaction is a focus in determining project effectiveness. It's monitored by direct, regular contact with the clients themselves by project Case Managers, the Program Supervisor, and the Director of Social Services. Clients are encouraged to articulate their suggestions, concerns, and challenges, as well as what works well for them. All active participants are contacted by staff regularly, and on-site case managers at senior buildings are coordinated with monthly. Feedback is monitored using annual satisfaction surveys. Clients are asked to report their rides' "on-time" statistics so that problems can be identified and addressed early and quickly.

Direct contact with the clients is extremely important and will help staff create plans tailored specifically to each client for better effectiveness. This will also help clients enrolled to better understand and utilize (and report back to us) their use of the transportation options we provide. Because *Senior Solutions* allows for individualization of services for clients, gaps in effectiveness will also be individual. This allows program staff to more easily take steps to improve each client's experience, to adjust the types of services provided, the frequency of services, or the Volunteer Driver assigned to a client.

We do directly book rideshare trips for clients; repeated no-shows are not a significant challenge for us. We have a very small percentage of no-shows, likely because we stay in constant communication with clients who are taking rideshare trips; each time a "no-show" occurs, clients receive a follow-up call to discuss the cause and ascertain if re-education on processes or further interventions are needed.

Project Scope of Work		
Organization Name:	Travelers Aid Society of San Diego	
Project Name:	Senior Solutions 5310	
Project Service Area:	Large Urbanized Area of San Diego County	
Funding Source and Project Type:	Section 5310 - Operating	
Section A: Project Description		
Project Description:	Senior Solutions fills transportation gaps for low-income seniors ages 65+ and individuals with disabilities of any age who are immunocompromised, and need safe travel options for doctor visits, dialysis appointments, cancer treatments, and shopping trips. The program provides free 1:1 trip options to enrolled clients, including door-to-door & door-through-door services utilizing volunteer drivers, rides with with partner agency door-to-door services, and ride share services.	
Section B: Summary of Project Tasks		
The following is a summary of the services that will be implemented through this project.		
Task 1:	Deliver Service	
Deliver service with a range of cost-effectiveness consistent with that proposed in the grant application. Ensure that at least 80 percent of the service's beneficiaries are members of the target population. Failure to achieve the below Performance Threshold within six months after grant execution will trigger the requirement to complete a Corrective Action Plan as defined in the Grant Agreement.		
Subtask	Subtask Description	Deliverable(s)
1.1	Ensure service beneficiaries are at least 65 years old, or persons with disabilities	100% of program beneficiaries will be members of the target population.
1.2	Ensure cost effective transportation services for this high-need population will be provided at the targeted cost per one way passenger trip (OWPT)	Target cost per OWPT: \$26.56
1.3		
Task 2:	Manage Transportation Services	
Subtask	Subtask Description	Deliverable(s)
2.1	Provide free transportation options for immuno-compromised low income older adults ages 65+ and low income individuals with disabilities of any age.	Provide 15,060 OWPT (one-way passenger trips) during the two year grant period (9,120 via Section 5310 funding; 5,940 via Match Funding) to 350 enrolled clients
2.2	Provide trips via partner door-to-door services and ride share services such as Uber and Lyft.	OWPTs: 1,968 via Uber or Lyft ride share services, and 2,352 via Peninsula Shepard Center or other door-to-door partners over the two year grant period
2.3	Provide trips via volunteer drivers	4,800 OWPTs via volunteer drivers during the two year grant period
2.4	Sponsor Annual Membership Fees for Peninsula Shepard Center cross-enrolled clients who qualify	72 annual memberships to be funded over two-year grant period
Task 3:	Monitor Program	
Subtask	Subtask Description	Deliverable(s)
3.1	Staff to monitor program to ensure the cost per one-way passenger trip is aligned with goals and targets	Average cost of each OWPT (one-way passenger trip) is \$26.56
3.2	Staff to meet monthly to discuss compliance, client needs, volunteer recruitment, transporatation gaps that have emerged, and any challenges that develop	48 Staff Meetings
3.3	Complete reporting packets monthly to ensure targets are achieved	24 Reports
Task 4:	Monitor Service Quality	
Subtask	Subtask Description	Deliverable(s)
4.1	Surveys will be created and distributed to create a pathway for feedback from clients and client family members	Two formal surveys (one per year) solicited from active enrolled Senior Solutions clients
4.2	Surveys will be created and distributed to create a forum through which we can receive feedback, ideas, suggestions, and challeges from volunteer drivers	Two formal surveys (one per year) solicited from Volunteer Drivers
4.3	Quarterly meetings with vendors and partner agencies as outlined in MOUs to ensure quality services for participants and make necessary adjustments	8 Quarterly Meetings (4 per year)

Task 5:	Coordinate with Partner Agencies	
Subtask	Subtask Description	Deliverable(s)
5.1	Ensure staff is informed about what is going on in our sector throughout SD County by attending monthly, bi-monthly, or quarterly meetings with partners and providers	Attend meetings (100+) with the Coalition for SD Specialized Transportation Providers, SSTAC, Age Well, Elder Protection Council CAM, MAPSS, SANDI Can, Nor Can, So Can, E Can
5.2	Ensure staff is trained and informed about best practices regarding warm hand-off procedures for referrals to other agencies	All responses and referrals will take place within 72 hours of requests
5.3	Join subcommittees within meeting groups to coordinate and collaborate about important sector issues such as Code of Conduct, Ride Referrals, and Partnerships	Monthly (or as needed); at least 24 meetings

Task 6:	Perform Program Marketing and Outreach	
Subtask	Subtask Description	Deliverable(s)
6.1	Create new outreach flyers for client enrollment and for Volunteer Driver recruitment; keep website updated and upload client and volunteer applications	Four promotional pieces (two per year), website updated annually
6.2	Monitor 211's site so ensure it's updated with the most current data about SenioRide and all our programs	Review and revision to 211's site listings 4 times (2x per year)
6.3	Arrange speaking engagements & outreach events to spread the word about Senior Solutions to potential participants, volunteer drivers, & philanthropic organizations	Speak to at least 12 outside organizations or event organizers per year (24 total)

Task 7:	Manage High Acuity Clients	
Subtask	Subtask Description	Deliverable(s)
7.1	Establish working, cooperative, and ongoing relationships with clients who have a high need for transportation assistance to manage their health conditions	Work with 85% of active, enrolled, high-need clients monthly
7.2	Work with case managers, healthcare facilities, and/or family members to create wrap-around solutions for high-need clients who have many appointments	Work with caregiving team of 15% of active, enrolled, high-need clients monthly
7.3	Review client usage of Senior Solutions offerings and seek out-of-program options for any unmet needs	Match 100% of active, enrolled clients with best services for their needs quarterly (both SS offerings and referrals to other options available to them) by reviewing their changing needs

Section C: Performance Measures and Targets

Project Type: Operating

Section C1: Quantitative Performance Measures and Targets	
Quantitative Performance Measures	Target
The Percentage of Those Served by the Project that are Members of the Target Population	100%
Minimum Service Hours per Week	40
Number of Traditional One-Way Passenger Trips	15,060
Number of Alternative One-Way Passenger Trips	
Total Number of One-Way Passenger Trips	15,060
Cost per One-Way Passenger Trip	\$26.56
Performance Threshold	\$34.53

Section C2: Qualitative Performance Measure and Target	
Qualitative Performance Measure	Target
Percentage of Project Beneficiaries Satisfied with the Service Provided	90%

Section C3: Other Performance Measures	
Other Project Performance Measures	Target

Project Schedule

Organization Name:	Travelers Aid Society of San Diego
Project Name:	Senior Solutions 5310
Project Service Area:	Large Urbanized Area of San Diego County
Funding Source and Project Type:	Section 5310 - Operating

	Year 1				Year 2			
Quarter	1	2	3	4	1	2	3	4
Task 1								
Subtask 1.1								
Subtask 1.2								
Subtask 1.3								
Task 2								
Subtask 2.1								
Subtask 2.2								
Subtask 2.3								
Subtask 2.4								
Task 3								
Subtask 3.1								
Subtask 3.2								
Subtask 3.3								
Task 4								
Subtask 4.1								
Subtask 4.2								
Subtask 4.3								
Task 5								
Subtask 5.1								
Subtask 5.2								
Subtask 5.3								
Task 6								
Subtask 6.1								
Subtask 6.2								
Subtask 6.3								
Task 7								
Subtask 7.1								
Subtask 7.2								
Subtask 7.3								

Project Budget

Organization Name:	Travelers Aid Society of San Diego
Project Name:	Senior Solutions 5310
Project Service Area:	Large Urbanized Area of San Diego County
Funding Source and Project Type:	Section 5310 - Operating

Section A: Budget Summary

Tasks	Grant	Match	Revenue	Total
Task 1	\$0	\$0	\$0	\$0
Task 2	\$146,578	\$200,000	\$0	\$346,578
Task 3	\$11,015	\$0	\$0	\$11,015
Task 4	\$11,015	\$0	\$0	\$11,015
Task 5	\$8,175	\$0	\$0	\$8,175
Task 6	\$10,812	\$0	\$0	\$10,812
Task 7	\$12,405	\$0	\$0	\$12,405
Total	\$200,000	\$200,000	\$0	\$400,000

Total Grant Amount:	\$ 200,000
Total Matching Funds:	\$ 200,000
Net Project Cost:	\$ 400,000
Total Revenue:	\$ -
Total Project Cost:	\$ 400,000

Section B: Match Details

Minimum Match Requirement:	50.00%
Match Percentage:	50.00%
Meet Minimum Match Requirement?	Yes

Section C: Indirect Costs

Will this project charge Indirect Costs?	Yes
What type of Indirect Cost Rate will be used?	de minimis rate
The de minimis rate applied to this project (%):	15%

Section D: Project Budget Categories

Task 1	Personnel	Fringe Benefits	Travel	Equipment	Supplies	Contractual	Other	Indirect	Total
Grant									\$0
Match									\$0
Revenue									\$0
Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Task 2	Personnel	Fringe Benefits	Travel	Equipment	Supplies	Contractual	Other	Indirect	Total
Grant	\$23,830	\$2,670	\$46,560		\$1,820	\$57,120	\$2,818	\$11,760	\$146,578
Match	\$38,500	\$4,000	\$68,000		\$1,200	\$87,300		\$1,000	\$200,000
Revenue									\$0
Total	\$62,330	\$6,670	\$114,560	\$0	\$3,020	\$144,420	\$2,818	\$12,760	\$346,578

Task 3	Personnel	Fringe Benefits	Travel	Equipment	Supplies	Contractual	Other	Indirect	Total
Grant	\$9,920	\$1,095							\$11,015
Match									\$0
Revenue									\$0
Total	\$9,920	\$1,095	\$0	\$0	\$0	\$0	\$0	\$0	\$11,015

Task 4	Personnel	Fringe Benefits	Travel	Equipment	Supplies	Contractual	Other	Indirect	Total
Grant	\$9,920	\$1,095							\$11,015
Match									\$0
Revenue									\$0
Total	\$9,920	\$1,095	\$0	\$0	\$0	\$0	\$0	\$0	\$11,015

Task 5	Personnel	Fringe Benefits	Travel	Equipment	Supplies	Contractual	Other	Indirect	Total
Grant	\$7,390	\$785							\$8,175
Match									\$0
Revenue									\$0
Total	\$7,390	\$785	\$0	\$0	\$0	\$0	\$0	\$0	\$8,175

Task 6	Personnel	Fringe Benefits	Travel	Equipment	Supplies	Contractual	Other	Indirect	Total
Grant	\$8,872	\$940			\$1,000				\$10,812
Match									\$0
Revenue									\$0
Total	\$8,872	\$940	\$0	\$0	\$1,000	\$0	\$0	\$0	\$10,812

Task 7	Personnel	Fringe Benefits	Travel	Equipment	Supplies	Contractual	Other	Indirect	Total
Grant	\$11,150	\$1,255							\$12,405
Match									\$0
Revenue									\$0
Total	\$11,150	\$1,255	\$0	\$0	\$0	\$0	\$0	\$0	\$12,405

All Tasks	Personnel	Fringe Benefits	Travel	Equipment	Supplies	Contractual	Other	Indirect	Total
Grant	\$71,082	\$7,840	\$46,560	\$0	\$2,820	\$57,120	\$2,818	\$11,760	\$200,000
Match	\$38,500	\$4,000	\$68,000	\$0	\$1,200	\$87,300	\$0	\$1,000	\$200,000
Revenue	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total	\$109,582	\$11,840	\$114,560	\$0	\$4,020	\$144,420	\$2,818	\$12,760	\$400,000

Budget Justification and Narrative: Senior Solutions

Cost Category 1: Personnel

The following positions work/will work on *Senior Solutions* for the duration of the project. Two positions are not filled at this time: Part-Time Case Manager and Program Supervisor; both will require recruitment of new staff members. The percentage of time each position is projected to spend working on *Senior Solutions* is derived from both historical and projected data.

Name	Position	Time Comm. in Years	Time Comm. % of FTE	Annual Salary	Monthly STGP Funded Salary	Annual STGP Funded Salary	Wage Rate
M. Roke	President	2	10%	\$87,750.00	\$731.25	\$8,775.00	Annual
A. Yemhatpe	Director of Social Services	2	10%	\$75,000.00	\$625.00	\$7,500.00	Annual
A. Servey	Operations Manager	2	10%	\$44,850.00	\$373.75	\$4,485.00	Hourly: \$23/hour
C. Compton	Volunteer Coordinator/ Receptionist	2	10%	\$40,950.00	\$341.25	\$4,095.00	Hourly: \$21/hour
Unfilled	Program Supervisor	2	10%	\$50,700.00	\$422.50	\$5,070.00	Hourly: \$26/Hour
A. Jaramillo	Part Time Case Manager	2	10%	\$28,080.00	\$234.00	\$2,808.00	Hourly: \$24/Hour
Unfilled	Part Time Case Manager	2	10%	\$28,080.00	\$234.00	\$2,808.00	Hourly: \$24/Hour

Annual Amount to be Funded by STGP:..... \$35,541.00

Total to be Funded by STGP: \$71,082.00

Cost Category 2: Fringe Benefits

Travelers Aid is a small organization without a group health benefits policy. Healthcare costs are reimbursed to employees on bi-monthly paychecks. Documentation of healthcare costs is submitted by employees, and there is a cap on how much employees are eligible for, currently set by our Board of Directors at \$700 per month. Employees who are not full time are eligible for reimbursement of healthcare costs at a percentage equal to their percentage of full time work (a person working 60% of a regular full time schedule is eligible for reimbursement of 60% of their healthcare costs). Dental and Vision benefits are optional, and available through our policy with Nonprofit Benefits Trust (part of CalNonprofits). Life insurance is provided to employees through Unum. One current employee turns in their healthcare invoices, which are paid directly by the organization, and documented via payroll.

Position	Fringe %	Annual Cost	Monthly STGP Funded Fringe	Annual STGP Funded Fringe
President	10%	\$8,400.00	\$70.00	\$840.00
Director of Social Services	10%	\$8,400.00	\$70.00	\$840.00
Operations Manager	10%	\$7,000.00	\$58.33	\$700.00
Volunteer Coordinator/Receptionist	10%	\$8,400.00	\$70.00	\$840.00
Program Supervisor	10%	\$7,000.00	\$58.33	\$700.00

Annual Amount to be Funded by STGP:..... \$3,920.00

Total to be Funded by STGP: \$7,840.00

Cost Category 3: Travel

Volunteer Drivers are paid one \$20 Stipend for each documented round trip for enrolled eligible clients. *Some Volunteer Drivers make additional stops for riders which brings the average cost per one way passenger trip to \$9.70. Vouchers are submitted documenting trips and must be signed by both client and driver. Enrolled clients are allowed to receive up to five (5) volunteer driver round trips each month. Each Volunteer Driver may drive more than one client. *Senior Solutions* is expected to provide approximately 200-250 volunteer driver rides each month; we estimate our Cycle 13 expense for stipends will be \$1,940 per month, and \$46,560 over the course of two years (24 months).

Travel	# Monthly	Individual Cost	Cost/Month	Annual Cost
Volunteer Driver	200 OWPT	*\$9.70/OWPT	\$1,940.00	\$23,280.00

Annual Amount to be Funded by STGP:..... \$23,280.00

Total to be Funded by STGP: \$46,560.00

Match Sources: In each year of the project, Travelers Aid will provide a 50% match, totaling \$200,000 (\$100,000 each in Years 1 and 2 of the project).

In-Kind Match: Volunteer Driver hours will be used as in-kind match. In its newest Value of Volunteer Time report, *Independent Sector*, with the *Do Good Institute*, announced on April 23, 2024 that the latest value of a volunteer hour in California is estimated to be \$38.61. *Independent Sector* is a coalition of nonprofits, foundations, and corporate giving programs that completes market research on volunteer service each year. The estimate is based on the average wage of non-management, non-agricultural workers using Department of Labor statistics.

Based on our long history of operating a volunteer driver program as well as inquiries with our drivers, we estimate that each One-Way Passenger Trip (OWPT) equates to 45 minutes of volunteer time and round trips (for which we will pay volunteer driver stipends of \$20) take approximately 90 minutes. The estimated 4,800 (200 per month x 24 months) volunteer driver OWPTs over the grant cycle yields \$138,996 in match dollars (4,800 OWPTs x .75 [45 minutes])

x \$38.61), more than twice as much as what is budgeted for the project. We've budgeted \$68,000 in match utilizing volunteer driver hours in the "Travel" Project Budget Category, to pair with the category in which the rides are budgeted.

Other Match Sources: As it has for the last few years, *Senior Solutions* is projected to win contracts with the City of San Diego CDBG program for it's work with individuals who reside in the City boundaries. Modest funding from the American Cancer Society is also projected.

Cost Category 4: Equipment: N/A

Cost Category 5: Supplies

Tangible property consists of office supplies such as paper, toner, file folders, pens, envelopes, labels, etc., as well as postage stamps and postal supplies, and (B&W and color) copies made on our office copiers. Travelers Aid takes advantage of low prices offered to nonprofits via Staples Advantage, and saves money on postage by using Stamps.com.

Supplies	Monthly Cost	STGP Funded Percent	Monthly STGP Funded	Annual STGP Funded
Copies/Printers	\$40.00	30%	\$12.00	\$144.00
Office Supplies	\$81.50	19%	\$15.50	\$186.00
Postage	\$180.00	50%	\$90.00	\$1,080.00

Annual Amount to be Funded by STGP:..... \$1,410.00

Total to be Funded by STGP: \$2,820.00

Cost Category 6: Contractual

Some of *Senior Solutions'* transportation options are purchased from providers and sent to or digitally issued by our staff. Whenever possible, we pursue and enjoy discounts. We work with Jewish Family Services' On the Go/CARS program to schedule and provide some ride share rides for clients who are not comfortable with texts, and with Peninsula Shepard Center (PSC) to serve the transportation needs of enrolled clients who reside in the Point Loma/Ocean Beach/Sports Arena area, including sponsoring the membership of selected individuals who qualify. We also schedule our own rides directly with Uber and Lyft Concierge whenever practical and possible for a lower ride share cost.

STGP Funded Transp. Type	# Monthly or Annually	Individual Cost	STGP Cost/Month	STGP Annual Cost
Uber	20 OWPT	\$21.12/OWPT	\$425.00	\$5,100.00
Lyft	46 OWPT	\$21.12/OWPT	\$975.00	\$11,700.00
OTG/CARS	16 OWPT	\$30/OWPT	\$480.00	\$5,760.00
PSC	98 OWPT	\$2.50/OWPT	\$245.00	\$2,940.00
PSC	3 Memberships	\$85/each	\$255.00	\$3,060.00

Annual Amount to be Funded by STGP:..... \$28,560.00

Total to be Funded by STGP: \$57,120.00

Cost Category 7: Other

Other costs that are part of the *Senior Solutions* program consist of administrative, marketing, and volunteer recruitment that are necessary to operate the program according to the contract requirements. An analysis has been completed to assign the proportion of each expense that is associated with *Senior Solutions*. The analysis is based on the proposed grant request dollar amount as compared to the entire organization's operating budget(s).

Supplies	Monthly Cost	STGP Funded Percent	Monthly STGP Funded	Annual STGP Funded
Background Checks	\$30.00	100%	\$30.00	\$360.00
Internet	\$100.00	10%	\$10.00	\$120.00
Website Hosting	\$30.00	10%	\$3.00	\$36.00
Phone Service	\$200.00	25%	\$50.00	\$600.00
Copier Contract	\$40.00	18.5%	\$7.40	\$89.00
Dropbox	\$75.00	20%	\$15.00	\$180.00
Volunteer Match	\$10.00	20%	\$2.00	\$24.00

Annual Amount to be Funded by STGP:..... \$1,409.00

Total to be Funded by STGP: \$2,818.00

Cost Category 8: Indirect

Additional costs that are part of the *Senior Solutions* program consist of non-profit insurance, office space leasing, international networking fees, accounting and audit services that are necessary to operate the program according to the contract requirements. An analysis has been completed to assign the proportion of each expense that is associated with *Senior Solutions*. The analysis is based on the proposed grant request dollar amount as compared to the entire organization's operating budget(s).

Indirect	Monthly Cost	STGP Funded Percent	Monthly STGP Funded	Annual STGP Funded
Philadelphia	\$750.00	10%	\$75.00	\$900.00
State Fund	\$150.00	10%	\$15.00	\$180.00
TAI Membership	\$100.00	10%	\$10.00	\$120.00
Audit	\$550.00	10%	\$55.00	\$660.00
Intuit/Payroll Expense	\$100.00	10%	\$10.00	\$120.00
Accounting Solutions	\$350.00	10%	\$35.00	\$420.00
Language Services Associates	\$100.00	10%	\$10.00	\$120.00
Rent	\$2,800.00	10%	\$280.00	\$3,360.00

Annual Amount to be Funded by STGP:..... \$5,880.00

Total to be Funded by STGP: \$11,760.00

Cost Per One Way Passenger Trip:

In Cycle 13, Travelers Aid's projected cost per one-way passenger trip (OWPT) for *Senior Solutions* is both cost-effective and reasonable, given the high acuity population it serves. All clients are immunocompromised, meaning they have chronic conditions like diabetes or heart disease, have a permanent disability, or they are undergoing dialysis, radiation, or chemotherapy. These clients have a special need for safer trip options, which are costlier than public transportation, and are often one driver/one passenger. The program offers a menu of transportation options which includes rides with volunteer drivers, taxi trips, rideshare trips on Uber or Lyft, and private door-to-door trips. Volunteer driver rides and trips with partner door-to-door providers operate at fixed rates, and staff schedule most Uber and Lyft rideshare trips directly from the software platform, which reduces the costs. These options are more cost-effective than taxi scrip, which is only distributed in a limited way for medical appointments.

Eligible enrolled clients receive services free and are never asked for fares or donations. The operating cost of the project over two years is \$400,000. Based on the estimated number of rides of 15,060, the projected cost per ride is **\$26.56**.

Use the selection tool to draw a service area on the map:

Total Population: **3,061,533**
Minority Population: **1,791,038**
Percent Minority: **58.501%**
Senior Population: **478,015**
Percent Senior: **15.614%**

☒ Census Urban Area

City name is any of

0 Selected

ZIP Code is any of

0 Selected

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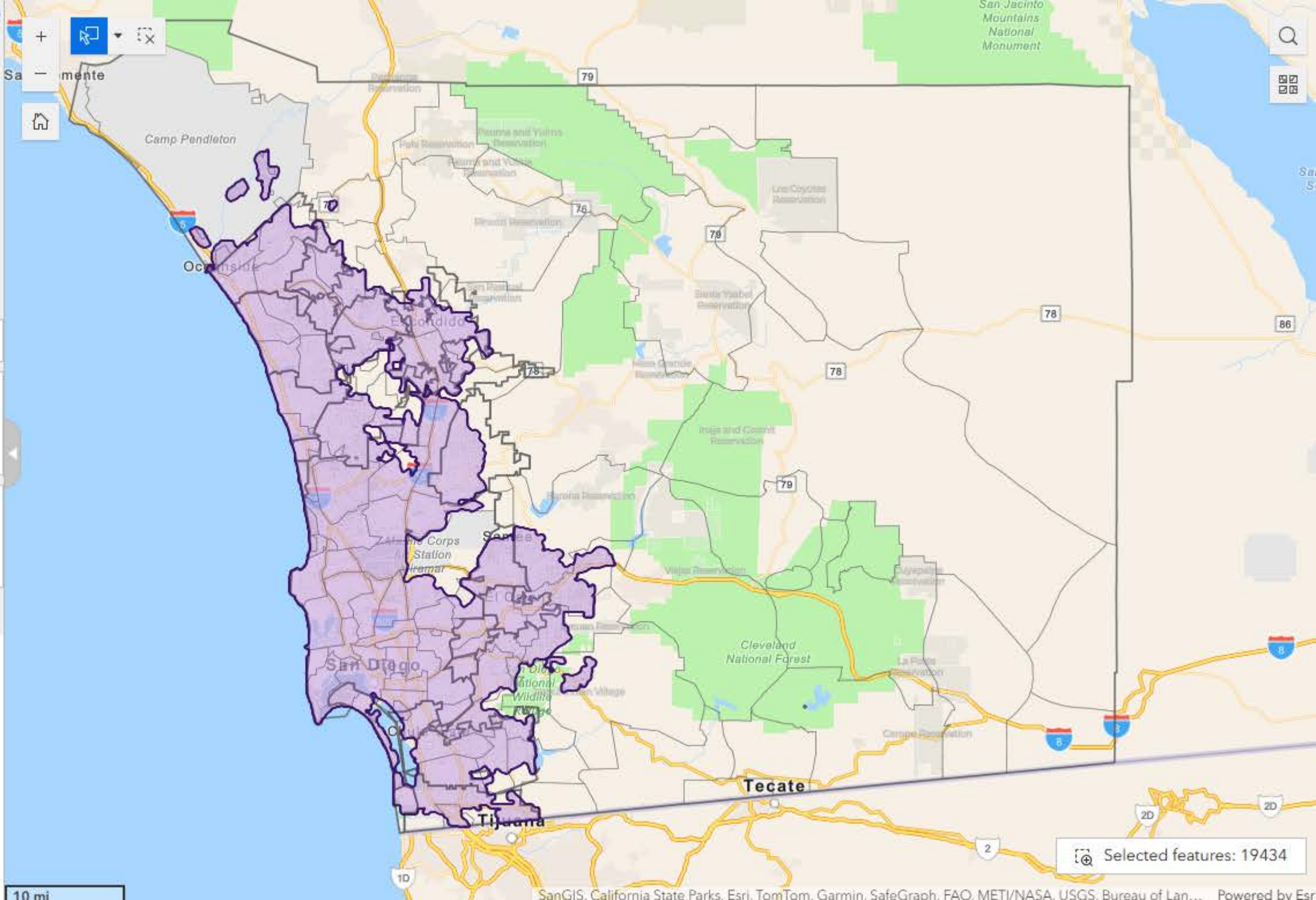


MGRA

City

1	San D
2	San D
3	El Caj

Total: 19,434 | Selection: 19,434



Our Purpose

Jewish Family Service partners with people of all backgrounds to build stable and dignified lives.

Together, we create a stronger and healthier community where everyone can thrive.



Jewish Family Service

Moving Forward Together

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Chief Advancement Officer

Tanya Hackel

September 20, 2024

SANDAG

Specialized Transportation Grant Program (STGP) Evaluation Committees

401 B Street, Suite 800

San Diego, CA 92101

SUBJECT: Support for Travelers Aid Society of San Diego's FTA Section 5310 and TransNet SMG grant project proposals

Dear STGP Evaluation Committees:

In 2016, Jewish Family Service of San Diego began working alongside Travelers Aid Society of San Diego as members of the SANDAG Social Services Transportation Advisory Council. Since then, both agencies have regularly served together on several working groups, relying on one another for up-to-date program information and brainstorming ways to address the unmet transportation needs of older adults and people with disabilities in San Diego County. Both agencies are founding members of the Coalition of San Diego Specialized Transportation Providers. We currently have an MOU in place which encourages cross-referrals for transportation options that are free to qualifying riders.

Travelers Aid's *SenioRide* program has successfully provided transportation options for low-income older adults in San Diego County for several years. Their *RIDEFinder* mobility management program expanded services for these existing clients and added new eligible populations starting in 2017. *Senior Solutions* is an important newer program, funded by SANDAG Section 5310 in Cycle 12, which provides transportation for low-income older adults and individuals with disabilities who have recurring dialysis or cancer treatment appointments. As a stakeholder and coordinating partner, we fully support their project proposals to renew their Senior Mini Grant and Section 5310 funding for *SenioRide*, *Senior Solutions*, and *RIDEFinder*.

Travelers Aid is a strong, dependable organization with a long history of providing critical services for those who have no other means. The San Diego region will be well-served by recognizing this organization's significant contribution to the community by approving their applications for grant funding. Their proposals to increase the mobility of seniors and disabled individuals by providing an array of transportation services from which they can choose is smart, organized, and flexible.

Jewish Family Service of San Diego is happy to endorse Travelers Aid in their bid for *SenioRide*, *RIDEFinder*, and *Senior Solutions* grant funding and we look forward to working with them to assist new and existing clients of these programs.

Sincerely,

Kristine Stensberg
Sr Director Nutrition & Aging
Jewish Family Service of San Diego



PENINSULA
SHEPHERD
CENTER

October 4, 2024

SANDAG
Specialized Transportation Grant Program (STGP) Evaluation Committees
401 B Street, Suite 800
San Diego, CA 92101

SUBJECT: Support for Travelers Aid Society of San Diego's FTA Section 5310 and TransNet SMG grant project proposals

Dear STGP Evaluation Committees:

Peninsula Shepherd Senior Center of San Diego began working with Travelers Aid Society of San Diego as members of the San Diego County Volunteer Driver Coalition in 2018, representing our door-to-door transportation program, *Out & About Peninsula*, and the Travelers Aid program, *SenioRide*. We currently have an MOU in place which encourages cross-referrals for transportation options that are free or donation-based for qualifying older adults and people with disabilities. Both agencies are also founding members of the Coalition of San Diego Specialized Transportation Providers which advocates for funding to agencies providing transportation to older adults and people with disabilities in San Diego County.

Travelers Aid's *SenioRide* program has successfully provided transportation options for low-income older adults in San Diego County for several years. Their *RIDEFinder* mobility management program expanded services for these existing clients and added new eligible populations starting in 2017. *Senior Solutions* is an important newer program, funded by SANDAG Section 5310 in Cycle 12, which provides transportation for low-income older adults and individuals with disabilities who have recurring dialysis or cancer treatment appointments. As a stakeholder and coordinating partner, we fully support their project proposals to renew their Senior Mini Grant and Section 5310 funding for *SenioRide*, *Senior Solutions*, and *RIDEFinder*.

Travelers Aid is a strong, dependable organization with a long history of providing critical services for those who have no other means. The San Diego region will be well-served by recognizing this organization's significant contribution to the community by approving their applications for grant funding. Their proposals to increase the mobility of seniors and disabled individuals by providing an array of transportation services from which they can choose is smart, organized, and flexible.

Peninsula Shepherd Senior Center of San Diego is happy to endorse Travelers Aid in their bid for *SenioRide*, *RIDEFinder*, and *Senior Solutions* grant funding and we look forward to working with them to assist new and existing clients of these programs.

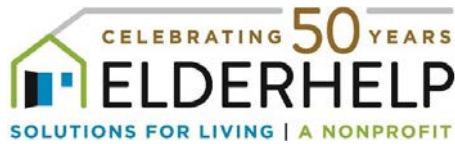
Sincerely,

Lisa Nokes
Executive Director
Peninsula Shepherd Center

1475 Catalina Blvd.
San Diego, CA 92107
Phone: (619) 223-1640
www.sdpssc.org

About Peninsula Shepherd Center:

Peninsula Shepherd Center is a 501(c) (3) nonprofit organization that serves seniors, 60 and older, in the Point Loma (92106), Ocean Beach (92107) and Midway/Sports Arena (92110) areas of the City of San Diego. All donations are tax deductible. Out tax ID number is 95 3626528. For more information about us, please visit www.sdpssc.org



September 9, 2024

SANDAG

Specialized Transportation Grant Program (STGP) Evaluation Committees
401 B Street, Suite 800
San Diego, CA 92101

SUBJECT: Support for Travelers Aid Society of San Diego's FTA Section 5310 and TransNet SMG grant project proposals

Dear STGP Evaluation Committees:

ElderHelp began working with Travelers Aid Society by providing door-to-door rides via our *Seniors A Go Go* program to their clients in 2017 in conjunction with their *SenioRide* program. We currently have an MOU in place to encourage cross-referrals for transportation options that are free to qualifying older adults and people with disabilities. Both agencies are founding members of the Coalition of San Diego Specialized Transportation Providers.

Travelers Aid's *SenioRide* program successfully provides transportation options for low-income older adults in San Diego County. Their *RIDEFinder* mobility management program expanded services for these existing clients and added new eligible populations starting in 2017. *Senior Solutions* is an important newer program, funded by SANDAG Section 5310 in Cycle 12, which provides transportation for low-income older adults and individuals with disabilities who have recurring dialysis or cancer treatment appointments. As a stakeholder and coordinating partner, we fully support their project proposals to renew their Senior Mini Grant and Section 5310 funding for *SenioRide*, *Senior Solutions*, and *RIDEFinder*.

Travelers Aid is a strong, dependable organization with a long history of providing critical services for those who have no other means. The San Diego region will be well-served by recognizing this organization's significant contribution to the community by approving their applications for grant funding. Their proposals to increase the mobility of seniors and disabled individuals by providing an array of transportation services from which they can choose is smart, organized, and flexible.

ElderHelp is happy to endorse Travelers Aid in their bid for *SenioRide*, *RIDEFinder*, and *Senior Solutions* grant funding, and we look forward to working with them to assist new and existing clients of these programs.

Sincerely,

Anya Delacruz
Associate Executive Director



Meet Our Clients



KEVIN

Kevin was introduced to Travelers Aid during a series of outreach events at the San Diego Center for the Blind. He took advantage of the Travelers Aid Orientation and Mobility Specialized offered through **RIDEFinder**. After Kevin was introduced to navigating mass transit, he went to the MTS Transit Store for his first SDM Pronto Card. Kevin now receives regular Pronto cards through **SenioRide** to get around the county. Travelers Aid encourages riders to utilize public transit whenever possible. Travel Training is offered to all participants who prefer to remain independent by traveling on the bus or trolley funded through Travelers Aid.

LAVINIA

Lavinia was referred to Travelers Aid through the Case Manager at her housing facility. Initially, Lavinia only needed assistance with funding MTS Access from **SenioRide** due to her limited mobility and visual impairment. Eventually, Lavinia found herself needing life-saving treatment and was enrolled in **Senior Solutions** for more one-on-one transportation options to essential medical appointments. Lavinia brightens the Travelers Aid office with each call and is the perfect example of how one can utilize the diverse agency offerings depending on each client's unique needs.



EARL

Earl received Travelers Aid contact information from his UCSD Oncology Case Manager during a time of need. He was new to the state and required daily visits to his medical treatments. Through **Senior Solutions**, Earl received the one-on-one trips required for his health and safety. After a remarkable recovery, Earl showed interest in exploring San Diego. He received Travel Training through **RIDEFinder** and he became comfortable with navigating the city. Now, Earl has frequent outings with his friends using **SenioRide** Pronto cards. He has become an advocate for Travelers Aid programs and refers anyone that can benefit from the services.



Free Transportation Options for low income County of San Diego residents who qualify*

Services include:

- ◆ Transportation for Dialysis Appointments
- ◆ Transportation for Cancer Treatments
- ◆ Transportation for Medical and Dental Visits
- ◆ Transportation for Groceries and Prescriptions
- ◆ Transportation for Banking and Civic Duties

**must be able to provide proof of income, residence in the large urbanized area of San Diego County, and documentation of immunocompromising disability*

Contact Adrianna Yemhatpe at 619-295-8393 x314
Please call for information and applications





Drivers Needed!

Travelers Aid Society needs **volunteer drivers** for our transportation programs

We offer **FREE** accessible travel options for low-income seniors and individuals with disabilities

- Drive in your own neighborhood
- Provide rides when it suits your schedule
- Vehicle stipends payable to you
- Help others regain independence
- Be part of the solution!

Becoming a volunteer driver is easy: fill out an application; submit license, insurance, registration, and DMV record; read/sign our manual.
For information and questions, call our **Director of Operations, Allie Servey**:

619-295-8393, ext. 308