



## Specialized Transportation Grant Program

Cycle 13 Call for Projects

### Organization Application

#### Applicant General Information

|                      |                           |
|----------------------|---------------------------|
| Applicant Legal Name | Peninsula Shepherd Center |
| DBA (If Applicable)  |                           |
| Applicant Address    |                           |
| Contact Name         | Lisa Nokes                |
| Title                | Executive Director        |
| Phone                | (619)990-9758             |
| Email                | lisa@sdpssc.org           |

#### Applicant Background

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

Peninsula Shepherd Center (PSC) is a 501 (c)(3) non-profit organization. PSC's mission is to provide a support system that allows older adults to live independently and self-sufficiently in their homes for as long as possible, while providing opportunities for seniors to meet, socialize, learn, and serve. Currently, PSC serves seniors 60 and older through transportation services, information and referral resources, a monthly luncheon and program, excursions, an outdoor walking program and activities in the only independent Senior Lounge in the area. The organization also partners with other local organizations serving seniors to provide members access to more activities and events. Our Out and About Peninsula Senior Transportation Program provides door through door service both through the volunteer driver/escort service and shuttle van service to older adults living in the Peninsula communities of Point Loma (92106), Ocean Beach (92107) and the Midway District (92110). PSC's mission statement ***"Creating a Community that Honors, Cares for and Respects Older Adults"*** and tagline ***"Empowering Senior Independence"*** illustrates our commitment to keeping seniors independent and active. In 2025, PSC is changing our name to **Peninsula Community Senior Center** to increase online visibility and better represent who we are and what we do every day.

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

PSC's Out and About Peninsula Senior Transportation Program ("Out and About") offers two distinct transportation services both covered by an annual fee of \$85:

The **daily van shuttle service** is available six days per week, Monday-Friday and Sunday churches services. The van shuttle takes clients on local errands (zip codes of 92106, 92107 and 92110), to shopping centers, errands, doctor's appointments, activities in PSC's Senior Lounge, as well as at other community venues, and on social outings. Clients call at least one day in advance and pay \$5 for each round trip.

The **personal volunteer driver service** offers three individual rides per month in volunteers' personal vehicles for non-emergency medical appointments and necessary errands outside the local area of 92106, 92107 and 92110. Clients call at least one week in advance and there is no tipping or paying the driver.

Successfully operating since 1989, the Out and About program aligns closely with STGP objectives by providing efficient, cost-effective transportation services exclusively to adults over 60. PSC partners with other senior transportation organizations to ensure adequate coverage for the community, including those residents with low or fixed income, disabilities and local veterans.

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

PSC has benefitted from STGP funding in multiple cycles since 2006.

## Applicant Eligibility Information

|                                                            |                                                                                                                                                                                                         |
|------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type of Applicant                                          | <input checked="" type="checkbox"/> Private nonprofit organization<br><input type="checkbox"/> State or local governmental agency, including local jurisdictions and operators of public transportation |
| Employer Identification Number                             | 95-3626528                                                                                                                                                                                              |
| Unique Entity Identifier<br>(Section 5310 Applicants only) |                                                                                                                                                                                                         |

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.

### **Total Grant Funding Requested by Applicant (All Proposed Grants)**

| Section 5310 | Senior Mini-Grant | Total     |
|--------------|-------------------|-----------|
| \$           | \$124,000         | \$124,000 |

## **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**.

## **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](mailto:grantsdistribution@sandag.org).

## **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.

## 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.

## 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.

## 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? | <input type="checkbox"/> Yes<br><input type="checkbox"/> No |

### For All Other Applicants

| Question                                                                          | Mark Yes or No                       |
|-----------------------------------------------------------------------------------|--------------------------------------|
| 1. Is the Applicant requesting Section 5310 funds through this Call for Projects? | <input type="checkbox"/> Yes<br>X No |

|                                                                                                                                                                    |                                                                        |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|
| 2. Does the Applicant own, operate, or manage capital assets used to provide "public" transportation services, rather than "client-based" transportation services? | <input type="checkbox"/> Yes<br><input checked="" type="checkbox"/> No |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|

## 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

# Senior Mini-Grant Operating Project Application

## 1 Applicant and Project Names

|                |                                                       |
|----------------|-------------------------------------------------------|
| Applicant Name | Peninsula Shepherd Center                             |
| Project Name   | Out and About Peninsula Senior Transportation Program |

## 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 | Lisa Nokes         |
| Title           | Executive Director |
| Phone           | (619)990-9758      |
| Email           | lisa@sdpsc.org     |

List the Signatory who, as a duly authorized representative of the Applicant, will sign the Senior Mini-Grant Agreement for the Applicant.

|                 |                    |
|-----------------|--------------------|
| Individual Name | Lisa Nokes         |
| Title           | Executive Director |
| Phone           | (619)990-9758      |
| Email           | lisa@sdpsc.org     |

## 3 Project Financial Summary

### 3.1 Grant Request, Match Amount, and Match Percentage

| Grant Request | Match Amount | Total | Match Percentage | Minimum Match Requirement |
|---------------|--------------|-------|------------------|---------------------------|
|---------------|--------------|-------|------------------|---------------------------|

|           |          |           |     |     |
|-----------|----------|-----------|-----|-----|
|           |          |           |     | t   |
| \$124,000 | \$41,729 | \$165,729 | 20% | 20% |

### 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                   | Fair Market Value of In-Kind Volunteer Driver Service Hours                                | \$31,229 |
| 2                   | Out and About Peninsula Senior Transportation program Van/Shuttle Trip Fees (\$5 per trip) | \$10,500 |
| 3                   |                                                                                            | \$       |
| 4                   |                                                                                            | \$       |
| 5                   |                                                                                            | \$       |
| Total               |                                                                                            | \$41,729 |

## 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

- X Maintain existing effective and efficient transportation services
- X 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
- X 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
- X Develop or expand transit or transportation solutions in areas with sufficient densities to support specialized transportation or coordinated services based on identified gaps.
- X 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
- X Increase interagency coordination efforts to maximize existing capacity
- X 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
- X 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).

PSC's Out and About Peninsula Senior Transportation Program meets the Very High Priority of maintaining existing and efficient transportation for our service area's large and growing senior population. Many in this area depend on Out and About to help them to independently remain in their own homes. The MTS Transit system does not cover all of PSC's service areas and is on a fixed schedule. The MTS Access Transit system does not meet the needs of a door-through-door escort service in the Peninsula communities, because it is a curb-to-curb service with drivers helping our members in and out of homes and their destinations. PSC provides rides for seniors to medical appointments, grocery shopping, necessary errands, educational and social events through our van/shuttle and volunteer/escort driver programs. The Volunteer Drivers program offers our members flexibility in the timing of appointments, whereas other programs have preset times and often have fixed routes of service.

PSC owns and operates three vans, one of which is wheelchair accessible, through our shuttle van service six days a week. Proper and regular maintenance of these vehicles is critical to sustain service levels and provide safe and comfortable transportation for our members. All vehicles are part of regular scheduled maintenance, smog checks and cleaning inside and out. Any vehicle issues are reported by staff drivers immediately for repair.

PSC will maintain and grow this efficient, effective and high-quality service and continue interagency coordination with Travelers Aid Society, Jewish Family Services, ElderHelp and other transportation services in our area. A referral process is in place among these agencies to assist with capacity planning and unexpected vehicle issues and maintain adequate service levels. Additionally, PSC and Travelers Aid Society have entered into a Memorandum of Understanding to expand transportation services for both agencies in a convenient, cost effective manner for low income older adults in our communities. PSC regularly also attends the Council on Access and Mobility and San Diego County Volunteer Driver Coalition meetings, which further promotes collaboration and the sharing of best practices.

PSC has been successful in securing interagency funding over the past few years and will continue to expand these opportunities. PSC is a member of the San Diego Seniors Community Foundation, a coalition of senior centers in San Diego County. The Foundation sponsors annual grant funding opportunities for agencies through its Empowering Senior Centers program. In addition, PSC received a grant through its association with Aging Forward, a national agency promoting transportation services and opportunities for socialization for older adults. This grant provided by Community Care Corporation was awarded to PSC and other Aging Forward agencies to further the development of our transportation programs.

|  |
|--|
|  |
|--|

## 5 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**.

## 6 Needs Accommodation Policy

The Target Population for Senior Mini-Grant projects is people 60 years of age and older. 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.

| Demographic Category                                   | Number | Percentage of Total |
|--------------------------------------------------------|--------|---------------------|
| Older Adults (60 and older)                            | 40     | 49%                 |
| Individuals with Disabilities                          | 0      | 0%                  |
| Older Adults and Individuals with Disabilities         | 41     | 51%                 |
| Neither Older Adults nor Individuals with Disabilities | 0      | 0%                  |
| Total                                                  |        | 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.

### o 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?

PSC is highly qualified to operate our Out and About Peninsula Senior Transportation program given our successful 35 year track record. With the exception of Cycle 12, we have received SMG grant funding from SANDAG since the program's inception in 2006. We have been fully compliant with all reporting requirements, including submitting quarterly invoices, and have received satisfactory ratings on all annual Desk Reviews, Monitoring Checklists and our Title VI plan. We have cultivated a productive relationship with the SANDAG Grants staff through regular feedback and communication. As a founding member of the San Diego County Volunteer Driver Coalition (SDCVDC), we have been active participants and satisfied quarterly reporting requirements for Volunteer Driver activity. Working with the SDCVDC agencies, we have benefitted from sharing Best Practices to more efficiently and effectively manage our respective transportation programs.

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?

PSC operates an efficient transportation services program in house without the use of third party contractors. The full time Executive Director oversees all administrative and financial management functions, transportation and social programs and the organization's community outreach and fundraising activities. The full time Office and Program Coordinator's primary responsibility is the day-to-day management of the Out and About Peninsula Senior Transportation program, along with responsibility for managing PSC's other programs, activities and office routines. The part time Activities Coordinator hosts activities in PSC's Senior Lounge and plans and attends all special transportation events, including PSC Excursions to areas of interest in San Diego and PSC Walks, transportation to local venues for light exercise and opportunities for socialization. Apart from the recent hiring of a new Van Driver to support special events, our staff of four part time van/shuttle drivers have an average of 10 years of experience with PSC and are very familiar with PSC members and all neighborhoods within our service area. We have 32 Volunteer Drivers providing escort transportation services to medical appointments. All staff and volunteer drivers undergo annual background and DMV checks and our volunteer drivers submit annual evidence of acceptable insurance. PSC uses the vendor IntelliCorp to perform comprehensive background checks and employment screening.

PSC utilizes RideScheduler, a ride scheduling and reporting management system, for our Volunteer Driver activities. RideScheduler captures all relevant information on transportation program members and Volunteer Drivers. The system is application based and allows Volunteer Drivers to review and select rides online based upon client requests entered by PSC staff. RideScheduler has robust reporting capabilities and allows for customized reporting as well. Ride requests for the van/shuttle service are accepted the day prior by noon and are transferred to a daily Van Schedule for van/shuttle drivers' use. The Office and Program Coordinator provides monthly reporting of all rides, including passenger and driver information, destination and pick up/drop off details.

PSC also utilizes My Senior Center (MSC), a database management system designed exclusively for senior centers. MSC captures data on all PSC members, staff, volunteers, donors. The database provides detailed information on our organization's activities, events and transportation activity, with the goal of evaluating the impact of regular activity and socialization over time on older adults' health and wellbeing.

All PSC vehicles are on a regularly scheduled maintenance program and, under the supervision of the Office and Program Coordinator. A designated PSC driver oversees the fleet's condition. PSC partners with a local mechanic who provides timely and reasonable maintenance services for all vans. Van drivers are responsible for fueling and cleaning the vehicles. A bi-weekly car wash schedule is in place and weekly inspections of the vehicles are performed by PSC staff to ensure licensing/insurance documentation, weekly transportation schedules/calendar of events/fuel and mileage logs are kept current. Staff ride-a-longs happen on a random basis to further monitor service levels.

PSC has an Employee Handbook that is regularly updated by our outside Human Resources attorney. The Employee Handbook includes all PSC policies and procedures, including expectations for employee conduct and an acceptable work environment. PSC

has adopted the Elder Abuse Prevention Training program developed by Aging and Independent Services of San Diego for all employees and volunteers. Volunteer Drivers further undergo detailed training on the use of the RideScheduler system. As previously discussed, PSC performs comprehensive background checks and employment screening.

The Executive Director reports to the Board of Directors and attends monthly Executive Committee and General Board meetings as a non-voting member. Financial statements are reviewed monthly with budget variance analysis performed quarterly. PSC has an independent Bookkeeper with extensive non-profit organization financial experience and utilizes QuickBooks for financial information processing and reporting. Annual 990 Forms are prepared by a Certified Public Accountant submitted annually with no history of irregularities. The Board Finance Committee is chaired by the PSC Board Treasurer, who has oversight over all financial duties performed by the Executive Director. This includes full review of all deposit, check and credit card activity to ensure the integrity of the process and adherence to PSC's annual budget. PSC's Finance Committee is currently working on a plan to institute an annual external audit program beginning in 2025.

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

PSC financial statements reflect a well run organization with effective cost control measures in place. PSC contracts with an independent Bookkeeper with extensive non-profit organization financial experience and utilizes QuickBooks for financial information processing and reporting. Annual 990 Forms are prepared by a Certified Public Accountant submitted annually with no history of irregularities. The Board Finance Committee is chaired by the PSC Board Treasurer, who has oversight over all financial duties performed by the Executive Director. The PSC Board Ways and Means Committee oversees the annual Fundraising Schedule and meets regularly to review and pursue opportunities for grant funding, donor campaigns to ensure that the organization has adequate cash flow to meet operating needs. The organization has an investment account managed by a financial professional at Edward Jones to support long term growth initiatives. PSC is well positioned to meet the service schedule and requirements of the SMG Cycle 13 grant term.

#### ○ **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?

Transportation services providing for the unique needs of older adults in PSC's service area are limited and generally inadequate. The current transportation services in PSC's service area are insufficient alternatives for the following reasons:

- MTS Transit does not offer transportation in all locations in our service area of 92106, 92107 and 92110. Pick up and drop off locations are not supportive for those needing specialized assistance.
- In addition, the MTS Access system, which transports individuals with disabilities, also does not cover all locations within the Peninsula Communities. It does not fulfill the need for a door-through-door escort service, because it is a curb-to-curb service that only provides a drop off and pick up program. These programs have preset times and specific routes, which do not always support appointment times.
- General public transportation is not conducive for older adults who often require assistance with their wheelchairs, walkers and canes. Our clients need personal hands-on assistance navigating their way into the vehicles both at their homes and destinations.
- Older adults often do not have Smartphones, or are unfamiliar with their functionality and, therefore, are not able to utilize ride share services, such as Uber and Lyft. These services are prohibitively expensive for regular use and require specialized knowledge and technology, rendering them unreasonable and intimidating alternatives for low income individuals and/or seniors on fixed incomes.

The dramatic shift in our country's demographics, driven by significantly increased life expectancy and the aging of the Baby Boomer population, brings daunting challenges to our communities going forward. Current and foreseeable public transportation is insufficient to support this huge population. PSC has partnered with other organizations serving seniors to provide critically needed services, including transportation, volunteer service opportunities, socialization and financial aid or transportation (see paragraph 6). This initiative is driven by the following compelling statistics:

- 11,000 Baby Boomers turn 65 every single day
- By 2034 there will be more people over age 60 than under age 18
- Life expectancy has increased from 55 in the 50's to 85 today
- By 2030 San Diego will be home to 930,000 individuals over age 60

6. How will the proposed service uniquely and urgently meet one or more

specialized transportation needs through the grant term?

In our service area's large and growing senior population, PSC's Out and About Peninsula Senior Transportation Program ("Out and About") provides efficient transportation with the required services to support seniors and their individual needs. The Out and About program offers two distinct transportation services both covered by an annual fee to clients of \$85, if they can pay:

The **daily van shuttle service** is available six days per week, Monday-Friday and Sunday for church services. The van shuttle takes clients on local errands (zip codes 92106, 92107 and 92110), to shopping centers, errands, doctor's appointments, activities in PSC's Senior Lounge, as well as other community venues, and on social outings. Clients call at least one day in advance by noon for this service. There is a \$5 fee payable on the van shuttle for each round trip, if they can pay.

The **personal Volunteer Driver service** provides three individual rides per month for non-emergency medical appointments and necessary errands outside the local area of 92106, 92107 and 92110. Clients call at least one week in advance for this service and there is no tipping or paying the driver.

PSC owns and operates three vans, one of which is wheelchair accessible, through our weekly shuttle van service. This service operates six days a week with multiple vans going out as required to support multiple activities and events. Out and About is also a door-through-door service with van drivers helping our members in and out of homes and through their doors with their equipment and personal items. As a way to utilize all transportation resources, our Volunteer Drivers can also transport clients in their personal vehicles to necessary medical appointments and accompany them home, escorting them during each transition for needed safety.

Many older adults no longer operate their own vehicles and depend on Out and About to help them to retain their independence, be active and social, and remain in their own homes. We often find seniors, who still maintain their own vehicles, utilize our service due to their reluctance to drive longer distances, on the freeway and/or after medical procedures. In addition, Out and About has the distinct advantage of offering our members flexibility in the timing of their appointments and pick up/drop off locations, whereas other programs have preset times and specific routes.

PSC's transportation program allows for an exception for those older adults with limited incomes and will waive the annual membership fee and/or the \$5 fee for roundtrips in our daily vans if needed. To further support the portion of our community on fixed incomes or those that fall within the County Defined Low Income segments, PSC entered into a Memorandum of Understanding (MOU) with Travelers Aid Society of San Diego (TASSD). TASSD's Senior Solutions program is available in PSC's service area for people 65 years and older and/or are disabled, who are considered low-income, reside in the Large Urbanized Areas of San Diego County and are immunocompromised.

PSC has also partnered with the Point Loma Rotary Club to raise awareness to the many veterans residing in our service area. As part of our veterans transportation services program and through our volunteer/escort program we transport members to the VA Hospitals and facilities in La Jolla and Balboa Park. PSC coordinates with the VA Transportation Departments of these services to promote the program and spread awareness. PSC publicizes these services, including a monthly article about veteran transportation services in our newsletter.

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)?

Transportation accessibility for the target population is not only critical for seniors to stay healthy, active and independent, but provides critically needed socialization. Recent lessons learned from the Covid lockdown shined a bright light on this issue and focused much needed attention on the damaging effects of social isolation on seniors and those with disabilities, our target populations. This isolation results from seniors living alone, with limited family members to act as caregivers or even to provide companionship. The days of extended families are gone: in part due to people having smaller families and limited resources to care for loved ones, when the financial norm is a required two-earner family. Moreover, often families must move away from their familial seniors and disabled family members, due to job requirements. Uniquely in this underserved community, PSC's Out and About Peninsula Senior Transportation program promotes independence, wellbeing and much needed social interaction.

We continue to evaluate demographic data from our service area to better understand the cultural and linguistic needs of our communities. PSC has many members with Limited English Proficiency (LEP) who speak another primary language in their home environments. We actively work with family members when further communication is necessary. PSC's service area's largest concentration of LEP population is Spanish speaking. We publish our brochure in Spanish, which is posted on our website and distributed to our local churches and Senior Living Communities. All required federal and state notifications, including Title VI notifications, are translated into Spanish and displayed in our Senior Lounge and on our website.

Our staff of seven is ethnically diverse with our Office and Program Coordinator who is African American and a van driver that is Pacific Islander. We also have staff who are conversant in Spanish. PSC actively looks for opportunities to reach out to our culturally diverse and LEP population to further support the needs of more members of our community. No one is turned away. Many of PSC's transportation members were born and raised in other countries and while many speak English, they often have heavy accents. Our staff and members are valuable ambassadors, as well, by welcoming and helping all members speaking their native language.

PSC has also partnered with the Point Loma Rotary Club to raise awareness to the many veterans residing in our service area. As part of our veterans transportation services program and through our volunteer/escort program we transport members to the VA Hospitals and facilities in La Jolla and Balboa Park. PSC coordinates with the VA Transportation departments of these services to promote the program and spread awareness. Both PSC and Point Loma Rotary publicize these services, including a monthly article about veteran transportation services in our newsletter.

PSC's transportation program allows for an exception to those older adults with limited incomes and will waive the annual membership fee and/or the \$5 fee for roundtrips in our daily vans. To further support the portion of our community on fixed incomes or those that fall within the County defined low income segments, PSC entered into a Memorandum of Understanding (MOU) with Travelers Aid Society of San Diego (TASSD). TASSD's Senior

Solutions program is available in PSC's service area for people 65 years and older and/or are disabled, who are considered low-income, reside in the Large Urbanized Areas of San Diego County and are immunocompromised. By partnering with TASSD, these community members residing in PSC's service area will have increased access to convenient and affordable transportation.

○ **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.

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

The health and safety of PSC's Out and About Peninsula Senior Transportation members is paramount. As such, we have a robust process to ensure safety protocols are in place and well known to all office staff, staff and Volunteer Drivers and the membership. These protocols include:

- PSC only accepts members who have gone through a thorough qualification process and are familiar with the program guidelines. Customer profiles contain important individual information, including mobility issues, special equipment needs (walkers, cane), vision or hearing issues. Transportation Rider Agreements are signed at the inception of the program and annually thereafter to ensure all member information is up to date. Member's may bring guests on trips with prior approval and PSC requires that each guest sign a Non-Member Transportation Waiver document.
- PSC staff drivers are experienced with an average tenure of 10 years and are very familiar with Out and About program policies and procedures.
- All staff and Volunteer Drivers are screened through background checks through IntelliCorp, a third party vendor that provides DMV and Criminal background checks. Staff drivers and Volunteer Drivers undergo an annual DMV check thereafter and Volunteer Drivers produce annual evidence of insurance.
- Emergency Contact lists are kept up to date and are used in the event of a rider issue or to report any incident occurring when using PSC's transportation services. A copy is maintained in each van information folder.
- Out and About is a door-through-door service which ensures that members are escorted safely in and out of vehicles and to and from their destinations.
- Every vehicle is equipped with first aid kits for minor injuries, water bottles, tissue and facemasks if needed. PSC staff communicate any and all incidents that occur with members while using our transportation services to emergency contacts and/or family members to ensure they are aware of the incident and our members get the appropriate care.
- All riders and drivers are required to wear seatbelts and all trips are scheduled with riders under or at vehicle capacity. Trips are never scheduled with riders exceeding the capacity of the vehicle.
- All vehicles are part of scheduled maintenance, smog checks, cleaning inside and out. Any vehicle issues are reported by staff drivers immediately for repair. Transportation schedules are published in PSC's monthly newsletter and on our website. In addition to reminder calls made by PSC staff the day prior to a scheduled ride, PSC procedures require drivers to call each rider when they are on their way to pick them up. This process is effective in reminding those riders that may have lost track of time, have a last minute conflict and/or ensure they are ready for pick up, enabling our vehicles to remain on schedule.
- PSC maintains a complimentary inventory of equipment for mobility assistance on site for the safety and convenience of our membership, as well as

the community. Members are welcome to take this equipment at any time to support any mobility or physical issues.

○ **Stewardship of Public Funds**

11. 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.*

12. 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.*

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

PSC's matching funds will be provided through in-kind Volunteer Driver service hours for the duration of the grant cycle. Volunteer Drivers use their personal vehicles and gasoline and receive no reimbursement from PSC for their services. Currently PSC has 32 Volunteer Drivers with 20 driving on a regular basis. While we actively recruit Volunteer Drivers, many of our drivers have been with PSC for over 10 years and we, therefore, consider our volunteer team to be imminently stable.

Our match calculation is based upon 90 volunteer/escort trips per month averaging 2.5 hours per trip, or 6,552 volunteer hours during the 2-year cycle. According to the Independent Sector, <http://independentsector.org/value-of-volunteer-time-2020>, each volunteer hour in 2020 is equivalent to \$28.54. This \$186,994 for in-kind volunteer hours far exceeds the match requirement of \$31,229, PSC needs to provide for the duration of the cycle.

## ○ **Coordination and Outreach**

14. 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.*

Peninsula Shepherd Center has been an active member of the San Diego County Volunteer Driver Coalition since its inception in 2008. The purpose of the Coalition is to explore collaboration opportunities, share best practices and avoid duplication. Vendor referrals, new policies and customer service protocols are among the many issues discussed. PSC staff members also attend the Council on Access and Mobility (CAM) meetings. Over the years, PSC has cultivated mutually beneficial relationships with the agencies in these organizations and regularly consult with their leaders on issues and ideas outside formal meeting settings. As a result of these relationships, in January of 2024, the Coalition of San Diego Specialized Transportation Providers was formed. PSC joined with the leadership teams from Jewish Family Services, ElderHelp, Travelers Aid Society of San Diego and St. Madeleine Sophie's Center to address equity and opportunities for specialized transportation service organizations. These meetings have been informative and productive, providing a more in depth understanding of each organization's programs and services for more effective collaboration. Jewish Family Services, ElderHelp and Travelers Aid Society have provided PSC Letters of Coordination. PSC has provided each of these agencies with Letters of Coordination as well. In addition, PSC has entered into a Memorandum of Understanding to partner in offering more cost effective transportation alternatives for low income seniors in our respective service areas.

PSC programs are available to any senior referred from another agency who lives within our service zip codes. In the event we receive referrals from outside our service areas, or have a capacity constraint, we actively refer riders to the partner agencies listed above and they reciprocate when they have similar needs.

15. 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?

Member satisfaction is critical for PSC's Out and About Peninsula Senior Transportation program to grow and thrive. PSC has a demonstrated history of success in serving our members with safe and comfortable transportation as evidenced by their long tenures. The independence and socialization derived from participating in Out and About transportation services enhances older adults' wellbeing and overall health. Frequent referrals from our members is further evidence of their satisfaction with our service. PSC's Volunteer/Escort service is particularly popular with our members due to the high touch relationship they develop with the drivers. At their suggestion, when possible, we have instituted a process to request specific drivers for these trips.

We include a Riders Survey with each annual renewal package to evaluate our drivers, staff and program features. Suggestions for improvements and new ideas are discussed and implemented when appropriate. PSC's popular Excursion and PSC Walks programs are planned with recommendations from our members about venues in San Diego of interest. Guests are welcome and regularly attend these trips. In addition, we regularly solicit feedback and suggestions from members and their families through our monthly newsletter, Facebook, website and special e-blast communications.

We hold quarterly staff driver meetings to provide feedback from our members, discuss ways to enhance safety, promote efficiency and improve customer service.

#### ○ **Environmental Responsibility**

16. 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?

PSC is committed to maximizing efficiency by planning routes that reduce mileage and gas consumption when scheduling daily transportation. Our drivers are all tenured employees and know the service area well, which enables them to be efficient in their routes and accommodate last minute additions or changes in the schedule. Individual trips are infrequent and PSC staff makes every effort to coordinate schedules to run vans with multiple riders. All vehicles are on a regularly scheduled maintenance program and, under the supervision of the Office and Program Coordinator, a designated PSC driver oversees the fleet's condition. PSC partners with a local mechanic who provides timely and reasonable maintenance services for all vans. Van drivers are also responsible for fueling and cleaning the vehicles. A bi-weekly car wash schedule is in place and weekly inspections of the vehicles are performed by PSC staff to ensure licensing/insurance documentation, weekly transportation schedules/calendar of events/fuel and mileage logs are kept current. Smog checks on all vehicles are completed as required.

As part of the van/shuttle shopping program, PSC provides shopping bags to each rider. This reduces the need for wasteful plastic bags. Additionally, the PSC office staff recycles all paper, plastic, electronics and printer cartridges with the appropriate recycling centers.

PSC delivers our Lamb's Tales monthly newsletter electronically to approximately 400 readers through our community outreach efforts. While our mailing list has grown, many of our readers prefer to receive it online. This reduces the number of paper newsletters mailed each month, without reducing the effectiveness of the outreach. We will continue to encourage E-news, thus reducing costs and conserving resources. Additionally, we market our transportation program through our regularly updated website and other electronic media sources to ensure cost-effective and efficient transmission of information. PSC uses our Facebook page to increase electronic communication and plans to begin to employ other social media outlets, such as Instagram, in 2025.

#### ○ **Proposed Performance Measures**

17. What is the proposed Minimum Service Hours per Week? **44**

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

18. What is the proposed Cost per One-Way Passenger Trip (OWPT)? **\$13.48**

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

#### ○ **Performance Monitoring and Outcomes**

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

PSC has managed the Out and About Peninsula Senior Transportation Program for 35 years and is committed to continual improvement of the program. Being on the front line, drivers regularly talk with the riders and report feedback to the office staff. PSC staff drivers have an average tenure with the organization of 10 years and understand the need for efficiency in planning our routes. They are very sensitive to the comfort and safety of our members and pass on any ideas to the office staff. Members have historically been very forthcoming with feedback and are comfortable providing suggestions both through the staff drivers and directly to office staff. Quarterly staff driver meetings further provide for information on member issues and facilitate corrective actions when necessary. Staff ride-a-longs are conducted to monitor the efficiency of the programs and solicit input from our riders. PSC also conducts an annual survey which riders return to staff for review and implementation of necessary modifications.

PSC tracks service quality and increases in service times that impact availability of transportation services for seniors by recording ride times and destinations visited. To monitor statistics PSC uses RideScheduler, a third party vendor with specialized software designed to schedule rides with members and Volunteer Drivers. RideScheduler provides robust reporting capabilities used to evaluate all aspects of the program's performance. These statistics are captured daily and reported quarterly to PSC's Board of Directors. If original goal targets are not on track, PSC works with staff to identify the barriers and propose solutions. In addition, RideScheduler is essential in evaluating route optimization and implementing necessary modifications.

Given our long history reporting performance statistics to SANDAG, in accordance with the grant agreement performance threshold provision, Peninsula monitors the actual number of rides as measured by one-way trips provided for seniors, as well as the actual number of seniors utilizing the services. PSC regularly assesses the obstacles and makes any necessary adjustments. PSC utilizes the SANDAG Senior-Mini Grant performance measures as its own performance measures to track the effectiveness of the Out and About Peninsula Senior Transportation Program.

The San Diego County Volunteer Driver Coalition has also developed a set of guidelines to make certain that PSC and its other members are effective in meeting our goals to ensure safety and responsibility for both riders and volunteers.

20. 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?

Our drivers all are tenured employees and know the service area very well which enables them to be efficient in their routes and accommodate last minute additions or changes in the schedule. In addition to reminder calls made by PSC staff the day prior to a scheduled ride, PSC procedures require drivers to call each rider when they are on their way to pick them up. This process is effective in reminding those riders that may have lost track of time, have a last minute conflict and/or ensure they are ready for pick up, enabling our vehicles to remain on schedule.

PSC hired an additional staff driver in 2023 to cover any open shifts due to illness or absence and drive an additional vehicle for special events. The availability of this driver has been successful in minimizing disruption in our service. Through our well developed tracking capabilities, PSC quickly becomes aware of increased transportation needs and has the ability to increase van service hours and routes.

PSC has an ongoing process for recruiting additional Volunteer Drivers to be able to better serve our seniors as membership increases. Given our successful history managing Out and About, in 2023 PSC was invited to participate in a program to develop transportation programs for older adults for the national organization, Aging Forward. The program is being funded by a grant provided by Community Care Corporation and has a particular focus on Volunteer Driver recruitment. The program will continue through the first quarter of 2025 and has provided valuable guidance for PSC in targeting the right set of skills necessary for recruiting successful volunteers for our transportation program.

21. 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?

PSC's volunteer drivers and van shuttle drivers help PSC to evaluate the Out and About Peninsula Senior Transportation program services by alerting us to the needs and concerns of individual riders, optimal routes and many of the sites that are frequently visited, such as local medical offices and stores. PSC staff drivers have an average tenure with the organization of 10 years and understand the need for efficiency in planning our routes. They are very sensitive to the comfort and safety of our members and pass on any ideas to the office staff. Members have historically been very forthcoming with feedback and are comfortable providing suggestions both through the staff drivers and directly to office staff.

Volunteer Drivers also help PSC monitor and evaluate Out and About by alerting the needs of individual riders. In addition to directly communicating with Volunteer Drivers, PSC staff use the Admin Comments section of RideScheduler, our third party scheduling and reporting software, to ensure individual concerns and needs are communicated to future drivers.

Over our 30 year history, PSC has experienced minimal rider no shows. All trips are confirmed the day prior and we have instituted an after hours communication process for members to report any appointment changes or cancellations to minimize disruption, arrange for rescheduling if necessary and to be respectful of staff and Volunteer Driver time.

PSC conducts an annual Transportation Services Survey with all members for valuable opinions and suggestions. Any necessary modifications are implemented as a result of this feedback. PSC's website and Facebook have become additional communication vehicles for member feedback and comments on service levels and suggestions for improvement.

| Project Scope of Work                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                    |                                                                                                                                                                                                                  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Organization Name:                                                                                                                                                                                                                                                                                                                                                                                              | Peninsula Shepherd Center                                                                                                          |                                                                                                                                                                                                                  |
| Project Name:                                                                                                                                                                                                                                                                                                                                                                                                   | Out and About Peninsula Senior Transportation Program                                                                              |                                                                                                                                                                                                                  |
| Project Service Area:                                                                                                                                                                                                                                                                                                                                                                                           | Zipcodes 92106, 92107, 92110                                                                                                       |                                                                                                                                                                                                                  |
| Funding Source and Project Type:                                                                                                                                                                                                                                                                                                                                                                                | Senior Mini-Grant - Operating                                                                                                      |                                                                                                                                                                                                                  |
| Section A: Project Description                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                    |                                                                                                                                                                                                                  |
| Project Description:                                                                                                                                                                                                                                                                                                                                                                                            | Peninsula Shepherd Center provides seniors age sixty and older living in the zipcodes of 932106, 92107 and 92110 with transp       |                                                                                                                                                                                                                  |
| 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                                                                                                                                                                                                                                                                                                                                                                                                             | Maintain program of seniors age 60 and older                                                                                       | Annually increase number of seniors served by 10% allowing for attrition of members moving or deceased                                                                                                           |
| 1.2                                                                                                                                                                                                                                                                                                                                                                                                             | Maintain low cost program for membership                                                                                           | Monitor ride service levels and performance statistics to keep cost per ride below program threshold                                                                                                             |
| 1.3                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                    |                                                                                                                                                                                                                  |
| Task 2:                                                                                                                                                                                                                                                                                                                                                                                                         | Maintain and expand the program's volunteer service                                                                                |                                                                                                                                                                                                                  |
| Subtask                                                                                                                                                                                                                                                                                                                                                                                                         | Subtask Description                                                                                                                | Deliverable(s)                                                                                                                                                                                                   |
| 2.1                                                                                                                                                                                                                                                                                                                                                                                                             | Maintain and expand the program's volunteer driver service for seniors living in zipcodes 92106, 9207 and 92110 west of I-8        | Annually increase number of seniors served by 10%, allowing for attrition of members moving and/or deceased, increase number of one way rides by 10%, recruit 10% more volunteer drivers                         |
| 2.2                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                    |                                                                                                                                                                                                                  |
| 2.3                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                    |                                                                                                                                                                                                                  |
| Task 3:                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                    |                                                                                                                                                                                                                  |
| Subtask                                                                                                                                                                                                                                                                                                                                                                                                         | Subtask Description                                                                                                                | Deliverable(s)                                                                                                                                                                                                   |
| 3.1                                                                                                                                                                                                                                                                                                                                                                                                             | Maintain and Expand shuttle van service for seniors living in zipcodes 92106, 92107 and 92110 west of I-8                          | Provide door through door shuttle van service 6 days a week for local errands, grocery shopping, medical appointments, social and civic engagement. Increase number of seniors served and trips by 10% annually. |
| 3.2                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                    |                                                                                                                                                                                                                  |
| 3.3                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                    |                                                                                                                                                                                                                  |
| Task 4:                                                                                                                                                                                                                                                                                                                                                                                                         | Coordinate with Other Transportation Providers                                                                                     |                                                                                                                                                                                                                  |
| Subtask                                                                                                                                                                                                                                                                                                                                                                                                         | Subtask Description                                                                                                                | Deliverable(s)                                                                                                                                                                                                   |
| 4.1                                                                                                                                                                                                                                                                                                                                                                                                             | Continue participating in coordination activities and pursue new opportunities for coordination with other social service agencies | Participate in local and national agency committees including SD County Volunteer Driver Coalition and CAM. Coordinate with JFS, Point Loma Rotary and other service organizations to provide transportation     |
| 4.2                                                                                                                                                                                                                                                                                                                                                                                                             | Partner with Travelers Aid Society of San Diego to offer alternatives for PSC members                                              | Collaborate with Travelers Aid Society of San Diego through a Memorandum of Understanding to participate in its SenioRide program and provide a lower cost transportation service to PSC members.                |
| 4.3                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                    |                                                                                                                                                                                                                  |

|                |                                                                                                            |                                                                                                                                                                                      |
|----------------|------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Task 5:</b> | <b>Market Demographics to Targeted Population</b>                                                          |                                                                                                                                                                                      |
| <b>Subtask</b> | <b>Subtask Description</b>                                                                                 | <b>Deliverable(s)</b>                                                                                                                                                                |
| 5.1            | Market the Out and About Peninsula Senior Transportation program to local seniors, families and volunteers | Provide easy to read materials and applications in English and Spanish including information on current and expanded services in monthly newsletter, on PSC website and on Facebook. |
| 5.2            |                                                                                                            |                                                                                                                                                                                      |
| 5.3            |                                                                                                            |                                                                                                                                                                                      |

|                |                                                                                                                               |                                                                                                                                                                                                                                                                                                 |
|----------------|-------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Task 6:</b> | <b>Monitor Program Effectiveness</b>                                                                                          |                                                                                                                                                                                                                                                                                                 |
| <b>Subtask</b> | <b>Subtask Description</b>                                                                                                    | <b>Deliverable(s)</b>                                                                                                                                                                                                                                                                           |
| 6.1            | Monitor services to ensure a high quality program for rides and volunteers by monitoring program efficiency and effectiveness | Collect and analyze information from riders, drivers, volunteers to meet community needs. Collaborate with SD County Volunteer Driver Coalition, CAM and Coalition of San Diego Specialized Transportation Services Providers on Best Preactives and implement effective and efficient program. |
| 6.2            |                                                                                                                               |                                                                                                                                                                                                                                                                                                 |
| 6.3            |                                                                                                                               |                                                                                                                                                                                                                                                                                                 |

|                |                            |                       |
|----------------|----------------------------|-----------------------|
| <b>Task 7:</b> |                            |                       |
| <b>Subtask</b> | <b>Subtask Description</b> | <b>Deliverable(s)</b> |
| 7.1            |                            |                       |
| 7.2            |                            |                       |
| 7.3            |                            |                       |

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                                                          | 44      |
| Number of Traditional One-Way Passenger Trips                                           | 11,500  |
| Number of Alternative One-Way Passenger Trips                                           |         |
| Total Number of One-Way Passenger Trips                                                 | 11,500  |
| Cost per One-Way Passenger Trip                                                         | \$13.48 |
| Performance Threshold                                                                   | \$17.52 |

| 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

|                                         |                                                       |
|-----------------------------------------|-------------------------------------------------------|
| <b>Organization Name:</b>               | Peninsula Shepherd Center                             |
| <b>Project Name:</b>                    | Out and About Peninsula Senior Transportation Program |
| <b>Project Service Area:</b>            | Zipcodes 92106, 92107, 92110                          |
| <b>Funding Source and Project Type:</b> | Senior Mini-Grant - Operating                         |

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

## Project Budget

|                                         |                                                       |
|-----------------------------------------|-------------------------------------------------------|
| <b>Organization Name:</b>               | Peninsula Shepherd Center                             |
| <b>Project Name:</b>                    | Out and About Peninsula Senior Transportation Program |
| <b>Project Service Area:</b>            | Zipcodes 92106, 92107, 92110                          |
| <b>Funding Source and Project Type:</b> | Senior Mini-Grant - Operating                         |

### Section A: Budget Summary

| Tasks        | Grant            | Match           | Revenue         | Total            |
|--------------|------------------|-----------------|-----------------|------------------|
| Task 1       | \$19,425         | \$4,803         | \$0             | \$24,228         |
| Task 2       | \$26,081         | \$6,467         | \$0             | \$32,548         |
| Task 3       | \$44,394         | \$10,993        | \$10,500        | \$65,887         |
| Task 4       | \$12,472         | \$3,558         | \$0             | \$16,030         |
| Task 5       | \$15,740         | \$3,948         | \$0             | \$19,688         |
| Task 6       | \$5,888          | \$1,460         | \$0             | \$7,348          |
| Task 7       | \$0              | \$0             | \$0             | \$0              |
| <b>Total</b> | <b>\$124,000</b> | <b>\$31,229</b> | <b>\$10,500</b> | <b>\$165,729</b> |

|                       |            |
|-----------------------|------------|
| Total Grant Amount:   | \$ 124,000 |
| Total Matching Funds: | \$ 31,229  |
| Net Project Cost:     | \$ 155,229 |
| Total Revenue:        | \$ 10,500  |
| Total Project Cost:   | \$ 165,729 |

### Section B: Match Details

|                                 |        |
|---------------------------------|--------|
| Minimum Match Requirement:      | 20.00% |
| Match Percentage:               | 20.12% |
| Meet Minimum Match Requirement? | Yes    |

### Section C: Indirect Costs

|                                                     |               |
|-----------------------------------------------------|---------------|
| Will this project charge Indirect Costs?            | No            |
| What type of Indirect Cost Rate will be used?       | Select Option |
| The Indirect Cost Rate applied to this project (%): |               |

## Section D: Project Budget Categories

| Task 1       | Personnel | Fringe Benefits | Travel | Equipment | Supplies | Contractual | Other | Indirect | Total    |
|--------------|-----------|-----------------|--------|-----------|----------|-------------|-------|----------|----------|
| Grant        | \$19,425  |                 |        |           |          |             |       |          | \$19,425 |
| Match        | \$4,803   |                 |        |           |          |             |       |          | \$4,803  |
| Revenue      |           |                 |        |           |          |             |       |          | \$0      |
| <b>Total</b> | \$24,228  | \$0             | \$0    | \$0       | \$0      | \$0         | \$0   | \$0      | \$24,228 |

| Task 2       | Personnel | Fringe Benefits | Travel | Equipment | Supplies | Contractual | Other   | Indirect | Total    |
|--------------|-----------|-----------------|--------|-----------|----------|-------------|---------|----------|----------|
| Grant        | \$19,425  |                 |        |           | \$666    |             | \$5,990 |          | \$26,081 |
| Match        | \$4,803   |                 |        |           | \$166    |             | \$1,498 |          | \$6,467  |
| Revenue      |           |                 |        |           |          |             |         |          | \$0      |
| <b>Total</b> | \$24,228  | \$0             | \$0    | \$0       | \$832    | \$0         | \$7,488 | \$0      | \$32,548 |

| Task 3       | Personnel | Fringe Benefits | Travel | Equipment | Supplies | Contractual | Other   | Indirect | Total    |
|--------------|-----------|-----------------|--------|-----------|----------|-------------|---------|----------|----------|
| Grant        | \$38,850  |                 |        |           | \$554    |             | \$4,990 |          | \$44,394 |
| Match        | \$9,607   |                 |        |           | \$139    |             | \$1,247 |          | \$10,993 |
| Revenue      | \$10,500  |                 |        |           |          |             |         |          | \$10,500 |
| <b>Total</b> | \$58,957  | \$0             | \$0    | \$0       | \$693    | \$0         | \$6,237 | \$0      | \$65,887 |

| Task 4       | Personnel | Fringe Benefits | Travel | Equipment | Supplies | Contractual | Other   | Indirect | Total    |
|--------------|-----------|-----------------|--------|-----------|----------|-------------|---------|----------|----------|
| Grant        | \$6,928   |                 |        |           | \$554    |             | \$4,990 |          | \$12,472 |
| Match        | \$2,172   |                 |        |           | \$139    |             | \$1,247 |          | \$3,558  |
| Revenue      |           |                 |        |           |          |             |         |          | \$0      |
| <b>Total</b> | \$9,100   | \$0             | \$0    | \$0       | \$693    | \$0         | \$6,237 | \$0      | \$16,030 |

| Task 5       | Personnel | Fringe Benefits | Travel | Equipment | Supplies | Contractual | Other   | Indirect | Total    |
|--------------|-----------|-----------------|--------|-----------|----------|-------------|---------|----------|----------|
| Grant        | \$8,700   |                 |        |           | \$704    |             | \$6,336 |          | \$15,740 |
| Match        | \$2,172   |                 |        |           | 178      |             | \$1,598 |          | \$3,948  |
| Revenue      |           |                 |        |           |          |             |         |          | \$0      |
| <b>Total</b> | \$10,872  | \$0             | \$0    | \$0       | \$882    | \$0         | \$7,934 | \$0      | \$19,688 |

| Task 6       | Personnel | Fringe Benefits | Travel | Equipment | Supplies | Contractual | Other | Indirect | Total   |
|--------------|-----------|-----------------|--------|-----------|----------|-------------|-------|----------|---------|
| Grant        | \$5,888   |                 |        |           |          |             |       |          | \$5,888 |
| Match        | \$1,460   |                 |        |           |          |             |       |          | \$1,460 |
| Revenue      |           |                 |        |           |          |             |       |          | \$0     |
| <b>Total</b> | \$7,348   | \$0             | \$0    | \$0       | \$0      | \$0         | \$0   | \$0      | \$7,348 |

| Task 7       | Personnel | Fringe Benefits | Travel | Equipment | Supplies | Contractual | Other | Indirect | Total |
|--------------|-----------|-----------------|--------|-----------|----------|-------------|-------|----------|-------|
| Grant        |           |                 |        |           |          |             |       |          | \$0   |
| Match        |           |                 |        |           |          |             |       |          | \$0   |
| Revenue      |           |                 |        |           |          |             |       |          | \$0   |
| <b>Total</b> | \$0       | \$0             | \$0    | \$0       | \$0      | \$0         | \$0   | \$0      | \$0   |

| All Tasks    | Personnel | Fringe Benefits | Travel | Equipment | Supplies | Contractual | Other    | Indirect | Total     |
|--------------|-----------|-----------------|--------|-----------|----------|-------------|----------|----------|-----------|
| Grant        | \$99,216  | \$0             | \$0    |           | \$2,478  | \$0         | \$22,306 | \$0      | \$124,000 |
| Match        | \$25,017  | \$0             | \$0    |           | \$622    | \$0         | \$5,590  | \$0      | \$31,229  |
| Revenue      | \$10,500  | \$0             | \$0    |           | \$0      | \$0         | \$0      | \$0      | \$10,500  |
| <b>Total</b> | \$134,733 | \$0             | \$0    |           | \$3,100  | \$0         | \$27,896 | \$0      | \$165,729 |

## Peninsula Shepherd Center

### SMG Operating Project: Out and About Peninsula Senior Transportation Program

#### Budget Justification

Below is PSC's narrative Budget Justification for our SMG Operating Project Out and About Peninsula Senior Transportation program.

#### **Cost Category 1: Personnel**

**Description:** Partial salary expenses for Executive Director, Office and Program Coordinator and Full salary expenses for five Staff Van Drivers

**Justification:** Partial salaries for PSC's Executive Director and Office and Program Coordinator are allocated to our budget request for personnel. Administration of the Out and About Peninsula Senior Transportation program is the primary role of the Office and Program Coordinator and the Executive Director also is involved in membership administration, scheduling rides, monitoring service levels, tracking information and preparing documentation to satisfy SANDAG reporting requirements. 100% of the Staff Drivers' salaries are included in the budget as well. Below is a table detailing the staff personnel information related to the personnel component of PSC's budget.

| EMPLOYEE          | TITLE                                | ANNUAL<br>SALARY – 2<br>Years     | REQUEST      | %    |
|-------------------|--------------------------------------|-----------------------------------|--------------|------|
| Lisa Nokes        | Executive<br>Director                | \$128,000.00                      | \$25,600.00  | 20%  |
| Lauren Taylor     | Office and<br>Program<br>Coordinator | \$83,200.00                       | \$54,080.00  | 65%  |
| Dennis Hiday      | Staff Driver                         | \$56,493.00<br>(Total<br>Drivers) | \$56,493.00  | 100% |
| Rob Keller        | Staff Driver                         |                                   |              |      |
| Cici Sayer        | Staff Driver                         |                                   |              |      |
| Neil<br>Malmquist | Staff Driver                         |                                   |              |      |
| Jim Hall          | Special<br>Event Staff<br>Driver     |                                   |              |      |
|                   |                                      | \$267,693.00                      | \$134,733.00 | 50%  |

#### **Cost Category 2: Fringe Benefits**

**Description:** PSC does not offer any employee fringe benefits

**Justification:** Not Applicable

**Cost Category 3: Travel**

**Description:** PSC is not forecasting any Travel expenses

**Justification:** Not Applicable

**Cost Category 4: Equipment**

**Description:** PSC is not forecasting any Equipment expenses

**Justification:** Not Applicable

**Cost Category 5: Supplies**

**Description:** The Supplies component includes items necessary for communication about our transportation services and publishing our monthly newsletter, The Lamb's Tales.

**Justification:** We are budgeting \$90 per month for postage to mail the above items and \$50 per month for paper and mailing supplies for a total of \$3,100.

**Cost Category 6: Contractual**

**Description:** PSC does not employ any third-party contractors

**Justification:** Not Applicable

**Cost Category 7: Other**

**Description:** The Other Category includes expenses for Rent, Ride Scheduler software licensing, Payroll Services (ADP), Vehicle Insurance, Xerox Copier Lease and Outside printing costs for items not supported by our leased copier.

**Justification:** All of the expenses below are necessary to support the administration and marketing of the Out and About Peninsula Senior Transportation program. Please see the Table below which breaks out the individual expenses over the two-year cycle.

|                                  |                    |
|----------------------------------|--------------------|
| <b>Other</b>                     | <b>\$27,896.00</b> |
| <b>Rent</b>                      | <b>\$ 6,000.00</b> |
| <b>Ride Scheduler Software</b>   | <b>\$ 1,140.00</b> |
| <b>ADP</b>                       | <b>\$ 600.00</b>   |
| <b>Insurance</b>                 | <b>\$12,032.00</b> |
| <b>Xerox Copier Lease</b>        | <b>\$ 5,640.00</b> |
| <b>Outside Printing Expenses</b> | <b>\$ 2,484.00</b> |

**Cost Category 8: Indirect**

**Description:** PSC is not forecasting any Indirect expenses and is not applying for a 5310 grant.

**Justification:** Not Applicable

## **Peninsula Shepherd Center**

### **Out and About Peninsula Senior Transportation Program**

#### **Matching Source Documentation and Methodology for Calculating the Fair Market Value of In-Kind Matching Funds**

PSC averages 90 volunteer/ escort rides trips per month in its Out and About Peninsula Senior Transportation Program. PSC projects 10% annual growth over the 2-year grant cycle funded by the SANDAG Senior Mini-Grant, bringing the total monthly trips to 109. Each trip averages 2.5 volunteer hours, totaling 273 volunteer hours per month, for a total of 6,552 volunteer hours in the 2-year grant cycle. According to the Independent Sector, <http://independentsector.org/value-of-volunteer-time-2020> , each volunteer hour in 2020, is equivalent to \$28.54 This total of \$186,994 for in-kind volunteer hours far exceeds the match of \$31,229 required by the SANDAG Senior-Mini grant for the 2-year grant cycle. Additionally, our volunteers use their own vehicles and gasoline and receive no mileage reimbursement for their services. Volunteer hours will be the match for the duration of the grant cycle.

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

Total Population: 70,141  
Minority Population: 24,328  
Percent Minority: 34.684%  
Senior Population: 12,350  
Percent Senior: 17.607%

Census Urban Area

City name is any of

1 Selected

ZIP Code is any of

3 Selected

Search

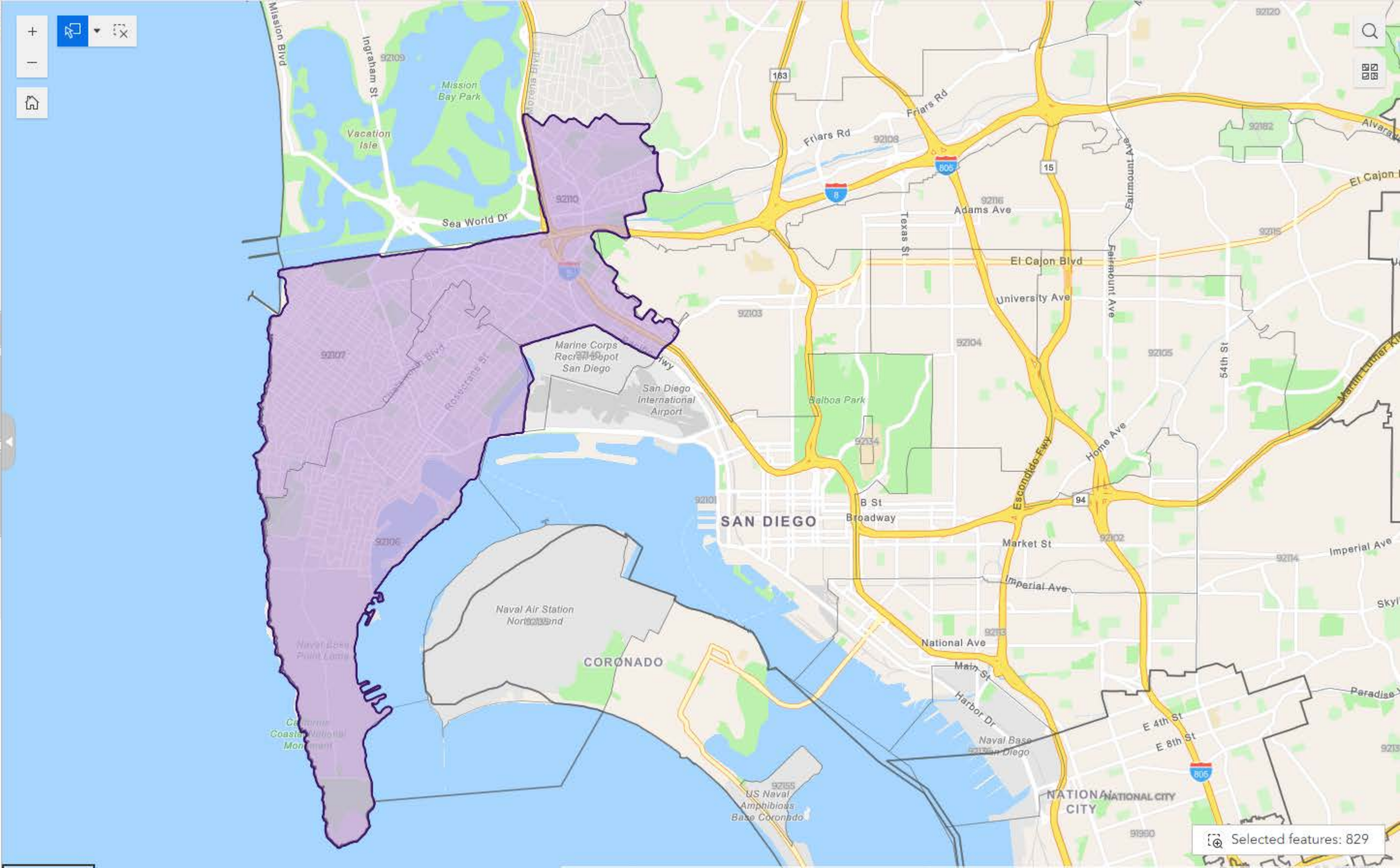
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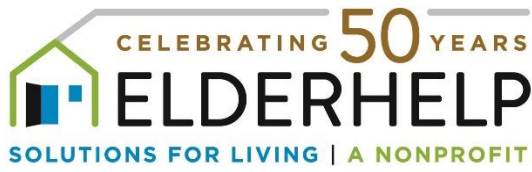
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SANDAG

Specialized Transportation Grant Program (STGP) Evaluation Committees

401 B Street, Suite 800

San Diego, CA 92101

SUBJECT: Support for Peninsula Shepherd Center's TransNet SMG grant project proposal

Dear STGP Evaluation Committees:

ElderHelp of San Diego is writing this letter in support of Peninsula Shepherd Center's application for STGP funding. We began working with Peninsula Shepherd Center as members of the San Diego County Volunteer Driver Coalition in 2018, representing our door-to-door transportation program, *Seniors A Go Go* and Peninsula Shepherd Center's *Out & About Peninsula Senior Transportation Program*. 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.

Peninsula Sheperd Center provides transportation services, which is a critical need for seniors in the communities they serve. ElderHelp values its partnership with Peninsula Shepherd Center and is happy to endorse their pursuit of grant funding for their *Out & About Peninsula Senior Transportation Program*. We look forward to working with them to assist new and existing clients of their program.

Sincerely,

Anya Delacruz

Associate Executive Director

## Letter of Coordination

October 7, 2024

RE: SANDAG Cycle 13

For over fifteen years, Peninsula Shepherd Center *Out and About Peninsula Senior Transportation program (OAPST)* and Jewish Family Service *On the Go (OTG)* transportation programs have enjoyed a collaborative and mutually beneficial relationship. Through active participation in the San Diego County Volunteer Driver Coalition, both entities have a strong history of contribution by sharing best practices, creation of marketing materials and an annual volunteer driver engagement event and training.

For the Cycle 13 Grant Project and in satisfaction of the 2020 Coordinated Plan High Priority of Interagency Coordination, Peninsula Shepherd Center and JFS/OTG propose to increase their interagency coordination efforts to maximize existing capacity and pool resources in the Peninsula Communities as follows:

1. JFS/OTG will refer riders to the Peninsula Shepherd Center for both the volunteer driver and shuttle program. Peninsula Shepherd Center will continue to refer to JFS/OTG for the volunteer driver program, OTG Navigator (on-demand) and other JFS/OTG services as needed. This partnership ensures that riders have access to the appropriate level of service without duplicating efforts.
2. The Peninsula Shepherd Center will have access to the JFS fleet upon availability. OTG fleet of drivers and vehicles for large group outings for either SANDAG funded Community Partner Shuttles or as a charter. To avoid duplication of service, ride counts or invoicing to SANDAG, the cost of JFS/OTG operating the shuttle will be charged to the OTG NSD service area and invoiced to SANDAG accordingly.
3. While performing outreach and community engagement in the Peninsula Communities, Peninsula Shepherd Center and JFS/OTG will mutually promote both programs for both ridership and volunteer recruitment.



**Kristine Stensberg**

Sr Director of Nutrition and Aging  
Jewish Family Service San Diego



**Lisa Nokes**

Executive Director  
Peninsula Shepherd Center



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**123 years of service to  
our community**

October 4, 2024

**SANDAG**

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

**SUBJECT:** Support for Peninsula Shepherd Center's  
TransNet Senior Mini Grant project proposal

Dear STGP Evaluation Committee:

Travelers Aid Society of San Diego began working with Peninsula Shepherd Center as members of the San Diego County Volunteer Driver Coalition in 2018, representing our *SenioRide* program and Peninsula Shepherd Center's *Out & About Peninsula Senior Transportation Program*. 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.

Peninsula Shepherd Center's mission is to provide a support system that allows older adults to live independently and self-sufficiently in their homes for as long as possible, while providing opportunities for seniors to meet, socialize, learn, and serve. Their *Out and About Peninsula Senior Transportation Program* has been in existence since 1996 and provides door through door service both through the volunteer driver/escort service and shuttle van service to older adults living in the Peninsula communities of Point Loma (92106), Ocean Beach (92107), and the Midway District (92110). This is an important program which serves its community well.

Travelers Aid Society of San Diego values our partnership with Peninsula Shepard Center and is happy to endorse PSC in their pursuit of TransNet Senior Mini Grant funding. We look forward to working with them to serve our mutual clients.

Sincerely,

Marcy Roke  
President & CEO