



June 18, 2025

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Amendment to Cooperative Agreements with Non-Profit Agencies to Provide Senior Mobility Program Services

Overview

The Senior Mobility Program is designed to offer transportation alternatives to seniors in addition to local fixed-route and paratransit service. Three non-profit agencies participate in the Senior Mobility Program and receive funding from local sources other than Measure M2 to support their services. Amendments to the current funding agreements with these three agencies are required to allocate funding for fiscal year 2025-26 and ensure the continuation of the service.

Recommendations

- A. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 4 to Cooperative Agreement No. C-1-3259 between the Orange County Transportation Authority and Abrazar, Inc., in the amount of \$91,560 to provide funding through June 30, 2026.
- B. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 5 to Cooperative Agreement No. C-1-3260 between the Orange County Transportation Authority and the Korean American Senior Association of Orange County, in the amount of \$112,566 to provide funding through June 30, 2026.
- C. Authorize the Chief Executive Officer to negotiate and execute Amendment No. 4 to Cooperative Agreement No. C-1-3261 between the Orange County Transportation Authority and Southland Integrated Services, Inc., in the amount of \$98,976, to provide funding through June 30, 2026.

Discussion

The Orange County Transportation Authority (OCTA) established the Senior Mobility Program (SMP) in 2001 to help expand transportation services for seniors. The SMP was funded with Transportation Development Act funds from 2001 through 2011. On November 7, 2006, Orange County voters approved Measure M (M2), renewing the one-half cent sales tax for transportation improvements. M2 include Project U which apportions funding to support specialized transportation programs for seniors and persons with disabilities, including the SMP. One percent of net M2 revenues is allocated to the SMP and distributed via formula funding to participating Orange County cities. The formula is based upon each city's population of residents aged 60 and older.

To date, 32 cities have implemented SMP services. In addition to these city-initiated programs, four local non-profit agencies operated SMP services before M2 became the primary funding source for SMP and were grandfathered into the program. These agencies provide services to seniors for trips that cross city boundaries, but do not qualify for M2 funding because the programs are operated by local non-profit agencies, not local jurisdictions. Because of the significant transportation benefit provided to the community, OCTA has continued to support these SMP programs using other local transit funding. As of December 31, 2018, the Jewish Federation and Family Services, one of the four non-profit agencies grandfathered into SMP, discontinued its SMP.

The three remaining non-profit agencies participating in the SMP are Abrazar, Inc., the Korean American Senior Association of Orange County, and Southland Integrated Services, Inc., formerly operating as the Vietnamese Community of Orange County. In fiscal year (FY) 2023-24, these agencies provided a total of 11,402 trips and were allocated \$299,585 in funding. For FY 2024-25, the allocated funding is \$309,890. As of the third quarter, these services have collectively provided 9,150 trips, approximately 79 percent of the total trips provided in the previous FY and are projected to exceed the budgeted trip volume. Although these agencies are ineligible for M2 funding, they remain in full compliance with SMP guidelines and continue to receive OCTA funding to support critical transportation services within the network.

In 2011, a baseline reimbursement was set based on anticipated annual trip volume. Since 2012, funding for each subsequent year has been determined by a formula utilizing the prior year's actual funding received and percentage of the anticipated growth of M2 net sales tax revenue. This growth rate aligns with M2 to uphold the program's guidelines. Consistent with funding provided to participating cities for the SMP, OCTA funds 80 percent of the trip cost and the

organization must provide at least a 20 percent match. The current funding agreements with these three non-profit agencies require amendments each year to provide funding for the subsequent FY.

To preserve these services and support OCTA's goal under M2 Project U to expand mobility choices for seniors and persons with disabilities, OCTA's Board of Directors' (Board) approval is necessary to execute amendments to provide the funds for these services through June 30, 2026. The total local funding allocation necessary for these services is \$303,102 per year and has been included in OCTA's Proposed FY 2025-26 Budget.

Fiscal Impact

These services are included in OCTA's Proposed FY 2025-26 Budget, Operations Division, account nos. 0030-7831-D1502-PDK, 0030-7831-D1502-PDW, and 0030-7831-D1502-PEE, using local transportation funds.

Summary

Based on the information provided, staff recommends the Board authorize the Chief Executive Officer to negotiate and execute amendments in the total amount of \$303,102 between Orange County Transportation Authority and Abrazar, Inc., the Korean American Senior Association of Orange County, and Southland Integrated Services, Inc., three SMP non-profit agencies, to provide trips to local seniors in Orange County through June 30, 2026.

Attachments

- A. Non-Profit Agency Funding Projections, Fiscal Years 2024-25 to 2025-26
- B. Abrazar, Inc., Cooperative Agreement No. C-1-3259 Fact Sheet
- C. Korean American Senior Association of Orange County, Cooperative Agreement No. C-1-3260 Fact Sheet
- D. Southland Integrated Services Inc., Cooperative Agreement No. C-1-3261 Fact Sheet

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