



July 8, 2021

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Enhanced Mobility for Seniors and Disabled Grant Program Call for Projects

Overview

The Orange Transportation Authority offers grant opportunities to non-profit organizations and local public agencies to help meet the transportation needs of seniors and individuals with disabilities. The Enhanced Mobility for Seniors and Disabled Grant Program augments existing OC Bus fixed-route service, OC ACCESS, and the Senior Mobility Program in Orange County. The Board of Directors is requested to approve the guidelines and release the 2021 Orange County Enhanced Mobility for Seniors and Disabled Grant Program call for projects.

Recommendations

- A. Approve the guidelines for the Orange County Enhanced Mobility for Seniors and Disabled Grant Program call for projects.
- B. Direct staff to issue the Orange County Enhanced Mobility for Seniors and Disabled Grant Program call for projects using up to \$4 million in local funding.

Background

Prior to fiscal year (FY) 2014, the Orange County Transportation Authority (OCTA) worked with the California Department of Transportation (Caltrans), the California Transportation Commission (CTC), and the Federal Transit Administration (FTA) to provide Federal Section 5310 (FTA 5310) funding through Caltrans to non-profit organizations and public agencies for the purchase and replacement of paratransit-type vehicles and related equipment to help meet the transportation needs of seniors and individuals with disabilities.

In FY 2015 and onward, Caltrans elected not to participate in this partnership citing significant cost increases in administration and staff time related to coordination with the large urban areas throughout the State, and inconsistencies in program delivery. In 2016, OCTA assumed the role of designated recipient for the FTA 5310 Program in Orange County to ensure funds are used effectively, efficiently, and consistently with federal requirements.

OCTA developed the Orange County Enhanced Mobility for Seniors and Disabled (EMSD) Grant Program, which, similar to FTA 5310, provides grant opportunities for non-profit organizations and local public agencies to help meet the transportation needs of seniors and individuals with disabilities. However, this local grant program replaces the FTA 5310 Program with local funds, which allows grantees to streamline project implementation. Further, this approach reduces the risk that a nonprofit or local agency may not be in non-compliance with federal requirements. Under this approach, OCTA develops and enters into funding agreements and provides oversight monitoring of EMSD grantees throughout the useful life of the grant-funded projects. In addition, OCTA retains the federal apportionment to support OC ACCESS service, consistent with Board of Directors (Board)-approved policies and prior actions.

As the regional transportation planning agency for Orange County, OCTA is responsible for conducting a call for projects (call) and allocating EMSD funds consistent with the priority strategies identified in the current Orange County Human Services Transportation Coordination Plan (Coordinated Plan), which was recently updated and approved by the Board on November 23, 2020.

Discussion

The 2020 update to the Coordinated Plan created funding priorities for the EMSD call, which include:

- Paratransit vehicle replacement and related equipment for existing vehicles that meet or exceed their useful life,
- New paratransit vehicles and related equipment that support the expansion of existing service,
- Expansion of existing transportation services that address the target population's transportation needs, which include expanding existing mobility management, and driver and travel training projects, and
- New transportation services that address the target population's unmet transportation needs, including new mobility management, and driver and travel training projects, and first- and last-mile trips.

Staff is recommending to make up to \$4 million in local transportation funds available for the 2021 EMSD call to fund transportation projects in FY 2021-22 through FY 2022-23. The funding level is consistent with the federal funding that OCTA receives and uses for ACCESS services under the FTA 5310 Program less ten percent for program administration.

Over the past seven months, staff has conducted extensive outreach to eligible applicants. Notification of funding availability and outreach efforts have included two guideline development workshops in April 2021, email notifications, surveys, phone calls, and an information hotline, in addition to presentations at the January 2021 and April 2021 Special Needs Advisory Committee meetings. Outreach efforts were intended to gather information on potential applicant needs that can be reflected in the call. Further, OCTA staff reached out to those non-profit organizations and local agencies that have not applied for EMSD funds in the past to gain an understanding of why they did not apply, and provide guidance as needed.

The April 2021 guideline development workshops were well-attended with approximately 40 attendees representing 33 agencies. Of these attendees, 24 agencies have not been funded by the grant in the past ten years, four were funded in 2011, one was funded in 2014, one was funded in 2016, and three were funded in 2018. Most of the attendee comments received related to requests to lower the local match requirement, as many applicants are currently facing operational difficulties due to impacts of the COVID-19 pandemic. OCTA incorporated this request into the proposed guidelines by reducing the local match requirement as further outlined below.

The Orange County EMSD Program Guidelines and Procedures (Guidelines) have been prepared for Board consideration in conjunction with the proposed 2021 EMSD call, as follows:

- Creation of a separate guideline document to support applicants in the application development process by providing information on goals, priorities, scoring criteria, requirements, and procedures (Attachment A).
- A temporary change to lower the capital match requirement from 20 percent to ten percent, and the operating assistance match requirement from 50 percent to 25 percent due to impacts from the COVID-19 pandemic. A reduction of the match requirement for mobility management, and driver and travel training projects under the operating category from 20 percent to ten percent to allow applicants to restore service and recover from the pandemic.

- A temporary change to lower the vehicle revenue hours from 20 hours to ten hours per week to allow applicants to restore service.
- Allow applicants to request funding to temporarily restore service to pre-COVID-19 levels for up to six months, and request funding to support COVID-19 response equipment to facilitate safe operations for their clients.
- Prioritization for applications that can demonstrate applicant outreach to senior and disabled patrons to ensure services are meeting their needs.
- The addition of timely use of funds provisions to encourage timely project implementation.
- Changes to the extension, scope change, and cost savings, invoicing, and reimbursement, and quarterly and final reporting processes to make the EMSD call consistent with other OCTA calls.

Issues and lessons learned from prior calls were also reviewed and considered. The proposed Guidelines were created to be more consistent and provide streamlining in the application process through project implementation.

The proposed Guidelines are being submitted to the Board for final consideration and approval. Authorization is also being requested to initiate the 2021 EMSD call, making \$4 million available in local funding to non-profit and local public agencies to help meet the transportation needs of their senior and disabled clients. The maximum award to any one applicant is \$600,000 to ensure equitable distribution of funds.

Next Steps

Staff is requesting approval to issue the 2021 EMSD call. With Board approval, staff will conduct additional outreach to ensure organizations are aware and notified of the call and assist with application submissions. OCTA will host an application development workshop to assist applicants in late July and conduct additional outreach with applicants as needed. Staff will convene an advisory panel to assist with the review and ranking of applications. The panel may include members that represent various disciplines within OCTA, as well as a representative from the OCTA Special Needs Advisory Committee and external agencies. Once the evaluation process is completed, staff anticipates returning to the Board with a list of recommended projects for consideration of funding.

The draft schedule for the call is as follows:

- July 12, 2021 – OCTA Board action considering the 2021 EMSD call,
- July 26, 2021 – OCTA applicant workshop to review the procedures and answer questions about the call,
- September 9, 2021 – applications due to OCTA,
- September – November 2021 – OCTA staff and EMSD advisory panel will review and rank the applications, and
- November 22, 2021 – Board consideration and approval of the program of projects.


Summary

Staff is requesting Board approval of the Guidelines and authorization release the 2021 EMSD call, providing up to \$4 million in FY 2021-22 and FY 2022-23 for projects to help meet the transportation needs of seniors and individuals with disabilities.

Attachment

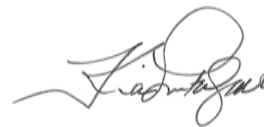
- A. 2021 Enhanced Mobility for Seniors and Disabled Grant Program Call for Projects Orange County Transportation Authority Guidelines and Procedures

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