



Adopted by the TAMC Board of Directors: September 28, 2022

Measure X Senior & Disabled Transportation Program

Grant Program Guidelines

Fiscal Years 2023/24, 2024/25, and 2025/26

Grant Applications Due:
Thursday, December 1, 2022 @ 12pm PST

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INTRODUCTION

Measure X

The Transportation Agency for Monterey County placed the Transportation Safety & Investment Plan (**Measure X**) on the November 8, 2016 ballot. The measure was approved with 67.7% approval from Monterey County voters. Measure X is anticipated to generate an estimated \$20 million annually for a total of \$600 million over thirty years through a retail transactions and use tax of a three-eighths of one percent (3/8%). The revenue from the sales tax measure will be used to fund transportation safety and mobility projects in Monterey County.

Based on extensive community and stakeholder input, Measure X priorities are to:

- Maintain local roads and repair potholes
- Increase safety and reduce congestion
- Improve transportation for youth, seniors, people with disabilities and working families
- Make walking and biking safer

Measure X funds are divided into two programs:

1. **Local Road Maintenance, Pothole Repairs and Safety:** 60% of Measure X funds are allocated to the County of Monterey and incorporated cities for local street and road safety and maintenance improvements.
2. **Regional Safety, Mobility and Walkability:** 40% of Measure X funds are allocated to regional safety and congestion relief, transit, and bicycle/pedestrian projects.

The Senior & Disabled Transportation Services Program is part of the Regional Safety, Mobility and Walkability Measure X Program.

SENIOR & DISABLED TRANSPORTATION SERVICES PROGRAM OVERVIEW

Needs Assessment

The Transportation Agency conducted a needs assessment to evaluate the transportation needs of seniors and people with disabilities by regional sub-areas of Monterey County.

Program Purpose & Goals

As spelled out in the **Policies & Project Descriptions for the Transportation Safety & Investment Plan**:

1. The purpose of this program is to increase transportation services for seniors and persons with disabilities to support their ability to live independently in their homes and communities.
2. This program will fund non-profit transportation to support seniors and persons with disabilities.
3. This program provides the following benefits:
 - Give seniors more transportation options
 - Support independent travel by people with disabilities
 - Provide safer and more reliable senior transportation services

The intent of this program is to fund projects, programs and operations that meet these goals.

For the purposes of this program, seniors are defined as adults age 65 and over.

Stakeholders & Representatives

Monterey-Salinas Transit Mobility Advisory Committee

The MST Mobility Advisory Committee serves as TAMC’s Social Services Transportation Advisory Council. In that capacity, the Committee serves as the stakeholder group for the development and implementation of this Measure X program. Membership of the Committee includes representatives from organizations that serve seniors, people with disabilities, veterans, and low-income people. The Committee is comprised of the following organizations:

Monterey-Salinas Transit Mobility Advisory Committee		
United Way Monterey County	Central Coast Center for Independent Living	Independent Transportation Network (ITN) Monterey County
Visiting Nurse Association	Monterey County Area Agency on Aging	Veteran’s Transition Center
Interim, Inc.	MC Military & Veteran’s Affairs	The Carmel Foundation
Alliance on Aging	The Blind and Visually Impaired Center	Partnership for Children

Measure X Citizens Oversight Committee

The Transportation Agency’s Measure X Citizens Oversight Committee will also participate in the development of the grant guidelines, evaluation of proposals, and in the submittal of recommendations for funding to the Transportation Agency’s Board of Directors.

FUNDING

Program Budget

This program funding allocation is \$15 million over 30 years, which is approximately \$500,000 per year. Implementation strategies were developed with the assistance of the Monterey-Salinas Transit Mobility Advisory Committee. Program funding for applicants are available in 3-year funding cycles.

Approximately \$1.5 million was set aside for each of the program's past 3-year cycles. Funds not expended in the current funding cycle will be carried forward and made available in future cycles.

Organizations may submit one-year or multi-year project funding requests. Organizations can also submit more than one application per grant cycle reflecting different operational or capital needs.

ELIGIBILITY

Eligible Applicants

Measure X Senior & Disabled Mobility Program funds are available for:

- 501(c)3 non-profit organizations that serve Monterey County residents.
- Organizations or collaborative projects that are not registered 501(c)3 non-profit organizations can partner with a tax-exempt, 501(c)3 non-profit organization that will serve as a fiscal sponsor for project implementation.
- Public agencies may be eligible if they partner with 501(c)3 non-profit organizations to complete the work included in the grant proposal.

Eligible Activities & Expenses

This program provides grants for projects that increase transportation services for seniors and persons with disabilities to support their ability to live independently in their homes and communities.

Eligible activities include, but are not limited to:

- Purchase or lease of accessible vehicles and vans.
- Purchase of computer hardware, software or other equipment that will support mobility programs.
- Operation expenses directly related to transportation service provided to seniors and/or disabled residents of Monterey County.
- Planning, development, and implementation of mobility service area and/or hours expansions.

- Marketing campaigns to promote mobility services for seniors and persons with disabilities.
- Voucher, mileage reimbursement and/or other trip subsidy programs.

Measure X Requirements

- The grantee must comply with the program purpose and goals as spelled out in the **Policies & Project Descriptions for the Transportation Safety & Investment Plan.**
- For ease of tracking and to assure full transparency, the grantee must maintain all revenues received and expenditures of these funds accounted for and tracked in its own separate account titled **“Transportation Safety & Investment Plan Account.”** The grantee will not commingle these funds with any other funds.
- Grantees shall use all Measure X funds solely for transportation purposes as defined by your Funding Agreement. Grantees that violate this provision must fully reimburse all misspent funds.
- **Media Requirements.** Organizations selected for funding must use the Measure X logo when promoting projects, programs or services funded by this Measure X program and acknowledge the Measure X program in news releases. Measure X funds can only be used to cover costs proportional to the promotional activities included in the scope of the grant award.
- **Annual Report.** Under no circumstances may the proceeds of this transportation sales tax be applied to any purpose other than for transportation projects, programs, and activities. Awarded applicants will certify in an annual verification submitted to TAMC that these transportation funds were used for eligible expenses. Organizations selected for funding must provide an annual report documenting communities served and success meeting project goals and proposed outcomes.

- **Funding Agreement.** Organizations selected for funding must sign a funding agreement with TAMC.
- **Audits.** TAMC reserves the right to audit organizations that are awarded funding under this project.
- **Quarterly Reimbursement.** Organizations selected for funding are required to complete reporting and invoicing on a quarterly basis. A one-time advancement would be considered.

Reimbursement Requirements

The project sponsor has three fiscal years (FY 23/24, 24/25, and 25/26) to expend the funds. Expenses can be incurred once the Funding Agreement has been signed by all parties.

Costs are to be invoiced on a quarterly basis and must comply with the Policies & Project Descriptions for the Transportation Safety & Investment Plan. Please see **Appendix A** for a sample quarterly reimbursement timeline.

All claims must include the following to be deemed valid for reimbursement:

- **Quarterly Claim** – Each quarterly claim must include the following to be deemed complete:
 - TAMC claim cover sheet.
 - Project budget with expenses to date and remaining funds.
 - Documentation of competitive procurement selection.
 - Invoices/receipts and applicable backup documentation.
- **Quarterly Progress Report** – Each quarterly progress report must include the following to be deemed complete:
 - Summary of activities to date (including brief discussion on successes, lessons learned and challenges, as applicable).

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- Attachments of program deliverables (i.e., number of trips provided, number of non-trip mobility services provided, flyers, news releases, log of grant-funded vehicle trips and maintenance).
- Summary of metrics used to track services provided (i.e., average cost per trip and/or average cost per non-trip mobility services provided).
- Photos of grant funded events or activities.

The Transportation Agency Measure X Senior and Disabled Transportation Program Project Manager, Finance Officer, and Executive Director will review and recommend approval or rejection of the claims.

Please see **Appendix A** for a sample quarterly claim and progress report.

SELECTION PROCESS

Step 1: Screen Proposals

- Applicants submit Proposals to TAMC staff.
- TAMC staff screens proposals for completeness and compliance with the program guidelines. Incomplete or noncompliant Proposals may be removed from the competitive process or TAMC staff may request applicants to provide additional information.

Step 2: Score Proposals

- Proposals will be evaluated by a grant review committee for scoring.
- The grant review committee will be made up of TAMC staff, representatives from the Monterey-Salinas Transit Mobility Advisory Committee, and the Measure X Citizens Oversight Committee.

Step 3: On-Site Field Visit

- Site visits are conducted for the most competitive projects.
- The on-site field visit will be made up of TAMC staff and the grant review committee. Additional information and/or documentation may be requested from applicants.
- Final scoring provided to the Measure X Citizens Oversight Committee.

Step 4: TAMC Board of Directors Approval

- Once Step 3 evaluations have been completed, the Measure X Citizens Oversight Committee submits recommendations for funding to the Transportation Agency's Board of Directors.
- Upon approval by the Board, grant awards are announced. The TAMC Board of Directors maintains discretion in amending the grant awards based on funding availability, and in making full or partial awards.

EVALUATION/SCORING CRITERIA

Information provided during the evaluation process should demonstrate how effectively the Proposal meets Measure X requirements and program goals.

Proposals will be evaluated using the scoring criteria noted in the table below. Proposals will receive an initial ranking with a score of 100 points possible.

Points will be attributed to each category and not to individual questions.

Scoring Criteria	Points
Program Purpose & Goals	25 points
Program Benefits	30 points
Feasibility	15 points
Geographic Equity	15 points
Cost Effectiveness	15 points
Total Points Possible	100 points

REQUIRED DOCUMENTATION FOR PROPOSAL

The following documents must be sent to TAMC staff as part of the Proposal:

- 1. Proposal Signature Page** – The signature page of the completed Proposal should be printed and signed by the Authorized Representative and/or Grant Coordinator. The Grant Coordinator will be the main point of contact for the duration of the grant.
- 2. Project Budget** – The project budget provides a cost estimate reflecting all costs associated with the project by fiscal year. Identify costs to be funded by the Measure X grant and costs covered by other funding sources (see **Appendix A** for a sample Project Budget template).
- 3. Project Timeline** – The project timeline outlines the main tasks needed to implement the project and includes a timeline to complete each task.

STEP 1: SCREEN PROPOSALS

Applicants are required to submit a Proposal to TAMC staff (refer to the Proposal Submittal and Grant Award Timeline section for due dates). Applicants with complete and compliant Proposals will be invited to compete in the next step of the evaluation process.

All Proposal submittals will include the following:

Project Title

Provide a brief project title.

Organization's History

Provide a brief description of your organization's history providing services to seniors and/or people with disabilities in Monterey County.

Project Summary and Need

Describe the project to be funded, including the main services provided and any expected project deliverables. Explain the transportation need that the project is addressing. *Summaries are limited to 1,000 words.*

How many part-time, full-time staff and/or volunteers will be involved in implementing the proposal?

Project Questions

Applicants must answer the following questions, **as applicable**. If a question does not apply to the project, indicate "not applicable" **with a brief explanation**. Do not leave blank fields. *Answers are limited to 500 words for each question.*

Program Purpose & Goals – 25 points

1. Explain how your organization currently supports the transportation needs of seniors and/or people with disabilities. *(500 words max.)*
2. Does your organization provide transportation or purchase transportation from others? Explain. *(500 words max.)*
3. Explain how the project coordinates with, and avoids duplication of, other efforts in the county to increase (provide new or alternate) transportation services to seniors and/or people with disabilities. *(500 words max.)*

Program Benefits – 30 points

4. Explain how the Measure X grant funding will increase (provide new or alternate) transportation services to:
 - a. Give seniors more transportation options. *(500 words max.)*
 - b. Support independent travel by people with disabilities. *(500 words max.)*
 - c. Provide safer and more reliable senior transportation services. *(500 words max.)*

Feasibility – 15 points

5. Are there any actions required by other organizations to implement the proposed project? *(500 words max.)*
6. What will happen to the proposed project if Measure X grant funding is not awarded (e.g., loss of matching funds, impacts on overall project vision, project momentum, timing difficulties, etc.)? *(500 words max.)*

Geographic Equity – 15 points

7. Identify which sub-area of Monterey County (North Monterey County, Greater Salinas Area, Monterey Peninsula, South Monterey County, Big Sur Coast) this project will benefit. *(500 words max.)*
8. Identify which sub-areas (North Monterey County, Greater Salinas Area, Monterey Peninsula, South Monterey County, Big Sur Coast) the proposed project will provide trips. *(500 words max.)*
9. Describe partnerships with other entities and their corresponding roles (if any) in the proposed project. *(500 words max.)*

Cost Effectiveness – 15 points

10. Explain how your organization's services are provided:
 - a. Number of trips and average cost per trip. *(500 words max.)*
 - b. Number of non-trip mobility services provided and average cost per non-trip mobility service provided. *(500 words max.)*
11. Submit a completed Project Budget.

Proposal Submittal and Grant Award Timeline

Date	Task
June 22, 2022	<ul style="list-style-type: none">• TAMC Board of Directors releases draft guidelines and needs assessment for public review.
July 27, 2022	<ul style="list-style-type: none">• MST Mobility Advisory Committee reviews draft guidelines and needs assessment.
August 16, 2022	<ul style="list-style-type: none">• Measure X Citizens Oversight Committee reviews draft guidelines and needs assessment.
September 28, 2022	<ul style="list-style-type: none">• Call for projects open.
<u>December 1, 2022</u> <u>@ 12pm PST</u>	<ul style="list-style-type: none">• <u>Cycle 3 applications due.</u>
December 5-21, 2022	<ul style="list-style-type: none">• Grant Review Committee meets to score applications and conduct site field visits
January 17, 2023	<ul style="list-style-type: none">• Grant Review Committee submits funding recommendations to Measure X Citizens Oversight Committee.
February 22, 2023	<ul style="list-style-type: none">• TAMC Board of Directors adopts Program of Projects for Fiscal Years 2023/24, 2024/25, 2025/26.

APPENDIX A

- Sample Quarterly Reimbursement Timeline
- Sample Quarterly Claim
- Sample Quarterly Progress Report
- Sample Project Budget
- Sample Project Timeline

Sample Quarterly Reimbursement Timeline

FY 2023/24

Quarter No.	Months Covered	Due Date
Q1	July 2023 – September 2023	October 31, 2023
Q2	October 2023 – December 2023	January 31, 2024
Q3	January 2024 – March 2024	April 30, 2024
Q4	April 2024 – June 2024	July 31, 2024
FY 2023/24 Report	July 1, 2023 – June 30, 2024	December 31, 2024

FY 2024/25

Quarter No.	Months Covered	Due Date
Q1	July 2024 – September 2024	October 31, 2024
Q2	October 2024 – December 2024	January 31, 2025
Q3	January 2025 – March 2025	April 30, 2025
Q4	April 2025 – June 2025	July 31, 2025
FY 2024/25 Report	July 1, 2024 – June 30, 2025	December 31, 2025

FY 2025/26

Quarter No.	Months Covered	Due Date
Q1	July 2025 – September 2025	October 31, 2025
Q2	October 2025 – December 2025	January 31, 2026
Q3	January 2026 – March 2026	April 30, 2026
Q4	April 2026 – June 2026	July 31, 2026
Close Out Report	FY 2023/24, 2024/25, and 25/26	July 31, 2026

Sample Quarterly Claim

1. TAMC Claim Cover Sheet

Complete and sign the top section of the TAMC claim cover sheet.

TRANSPORTATION AGENCY FOR MONTEREY COUNTY
CLAIM COVER SHEET
MEASURE X SENIOR AND DISABLED TRANSPORTATION PROGRAM (Fund 7200)
REQUEST FOR REIMBURSEMENT

Fiscal Year _____	Quarter No. _____
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The [grantee name] , a 501(c)3 non-profit organization in Monterey County, requests reimbursement in the amount of \$ [amount] . For the period beginning [month, day, year] and through and inclusive of [month, day, year] .

I certify that I am a duly authorized representative of [grantee name] and the request for reimbursement is consistent with the terms of the Measure X Grant Funding Agreement dated [month, day, year] entered into between [grantee name] and the TRANSPORTATION AGENCY FOR MONTEREY COUNTY.

Total Measure X Grant Amount	\$ _____
Amount Invoiced to Date	\$ _____
Current Invoice	\$ _____
Balance	\$ _____

Name (Please print)	Signature	Date
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APPROVAL OF TRANSPORTATION AGENCY FOR MONTEREY COUNTY

I certify that I am duly authorized by the TRANSPORTATION AGENCY FOR MONTEREY COUNTY to approve payment to the [grantee name] in the amount of \$ [amount] . The request for reimbursement is consistent with the Measure X Grant Funding Agreement between the TRANSPORTATION AGENCY FOR MONTEREY COUNTY and [grantee name] .

1. TAMC Project Manager

Name (Please print)	Signature	Date
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2. TAMC Director of Finance and Administration

Name (Please print)	Signature	Date
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3. TAMC Executive Director

Name (Please print)	Signature	Date
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Date TAMC Received Invoice	Date Invoice Revision Notification Sent	Date Invoice Sent to Accounting
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2. Expenses Breakdown

Provide a breakdown of expenses by each expense category included in the **Project Budget**.

Expenses

Personnel

Salary Program Manager.....\$

Driver Wages.....\$

Taxes and Benefits.....\$

TOTAL PERSONNEL.....\$

Other Expenses

Program Equipment.....\$

Publications.....\$

Rent and Utilities.....\$

Travel Vouchers.....\$

Vehicle Purchase.....\$

TOTAL OTHER EXPENSES.....\$

TOTAL EXPENSES.....\$

3. Receipts and Quotes

Provide copies of receipts/invoices for grant-related purchases. Include quotes for price comparison and procurement justification. Backup documentation should be separated by each expense category of the **Project Budget**.

Sample Quarterly Progress Report

1. Summary of Activities to Date

Provide a brief discussion on successes, lessons learned, and challenges, as applicable. As an example:

During the first quarter of fiscal year 2023/24, the organization completed the following activities: procurement and purchase of program equipment, developed marketing materials, and recruited two new drivers. This quarter the organization faced challenges recruiting drivers because applicants did not meet all job requirements.

2. Attachments of Program Deliverables

Provide an attachment of program deliverables (i.e., number of trips provided, number of non-trip mobility services provided, flyers, news releases, log of grant-funded vehicle trips, and maintenance, as applicable). As an example:

Attached to this report are the following program deliverables for the first quarter of fiscal year 2023/24:

- 1. Program Equipment Specifications*
- 2. Marketing Materials*
- 3. Driver Job Posting*

3. Summary of Metrics Used to Track Services Provided

Provide a summary of metrics used to track services provided (i.e., average cost per trips and/or average cost per non-trip mobility services provided). As an example:

During the first quarter of fiscal year 2023/24, the organization did not provide any direct services to seniors and/or people with disabilities. However, the average cost of the program equipment is roughly \$7 while the average cost of the marketing materials is approximately \$12.

4. Photos of Grant Funded Events or Activities

Include at least one photo of grant-funded events or activities. As an example:

Attached to this report are the following photo(s) for the first quarter of fiscal year 2023/24:

- 1. Photo of program equipment.*

Sample Project Budget

The project budget provides a cost estimate reflecting all costs associated with the project by fiscal year. Identify costs to be funded by the Measure X grant and costs covered by other funding sources.

Name of Organization: Project Title

EXPENSES	TOTAL Measure X Budget	FY 20/21	FY 21/22	FY 22/23	TOTAL Matching Funds	TOTAL Project Cost
Personel Expenses						
Salary Program Manager	\$ 150,000.00	\$ 50,000.00	\$ 50,000.00	\$ 50,000.00	\$ 20,000.00	\$ 170,000.00
Driver Wages	\$ 200,000.00	\$ 66,000.00	\$ 67,000.00	\$ 67,000.00	\$ 25,000.00	\$ 225,000.00
Taxes and Benefits	\$ 60,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	\$ 5,000.00	\$ 65,000.00
Total Personel Expenses	\$ 410,000.00	\$ 136,000.00	\$ 137,000.00	\$ 137,000.00	\$ 50,000.00	\$ 460,000.00
Other Expenses						
Program Equipment	\$ 6,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ -	\$ 6,000.00
Publications	\$ 13,500.00	\$ 8,000.00	\$ 3,500.00	\$ 2,000.00	\$ -	\$ 13,500.00
Rent and Utilities	\$ 30,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 30,000.00	\$ 60,000.00
Travel Vouchers	\$ 6,000.00	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 3,000.00	\$ 9,000.00
Vehicle Purchase	\$ 75,000.00	\$ 25,000.00	\$ 25,000.00	\$ 25,000.00	\$ -	\$ 75,000.00
Total Other Expenses	\$ 130,500.00	\$ 47,000.00	\$ 42,500.00	\$ 41,000.00	\$ 33,000.00	\$ 163,500.00
TOTAL GRANT REQUEST	\$ 540,500.00	\$ 183,000.00	\$ 179,500.00	\$ 178,000.00	\$ 83,000.00	\$ 623,500.00

Sample Project Timeline

The project timeline must outline the main tasks needed to implement the project and include a timeline to complete each task. Sample project tasks are provided below.

1. Project Initiation

Task 1.1 Project Kick-Off Meeting

- **Brief Task Description:** *[Sample Text: The organization will hold a kick-off meeting with TAMC and other project partners to discuss grant procedures and project expectations including involving, quarterly reporting, and all other relevant project information.]*
- **Project Deliverable:** *[Sample Text: Meeting Notes]*
- **Expected Completion Date:** *[Sample Text: August 2023]*

Task 1.2 Release Job Posting for Drivers

- **Brief Task Description:** *[Sample Text: Complete recruitment process for selection of qualified drivers with superb customer services skills.]*
- **Project Deliverable:** *[Sample Text: Job Posting]*
- **Expected Completion Date:** *[Sample Text: October 2023]*

Task 1.3 [Task Title]

- **Brief Task Description:** *[provide a brief task description]*
- **Project Deliverable:** *[provide a brief project deliverable description]*
- **Expected Completion Date:** *[provide the month and year of expected completion date]*

2. Public Outreach

Task 2.1 [Task Title]

- **Brief Task Description:** *[provide a brief task description]*
- **Project Deliverable:** *[provide a brief project deliverable description]*

- **Expected Completion Date:** *[provide the month and year of expected completion date]*

3. Transportation Service

Task 3.1 [Task Title]

- **Brief Task Description:** *[provide a brief task description]*
- **Project Deliverable:** *[provide a brief project deliverable description]*
- **Expected Completion Date:** *[provide the month and year of expected completion date]*

4. Fiscal Management

Task 4.1 [Task Title]

- **Brief Task Description:** *[provide a brief task description]*
- **Project Deliverable:** *[provide a brief project deliverable description]*
- **Expected Completion Date:** *[provide the month and year of expected completion date]*