

ORIGINAL

COVER SHEET

APPLICANT INFORMATION

Legal Name of Organization: Outreach & Escort Inc.

Mailing Address: 926 Rock Ave, Suite 10

City: San Jose

State: California

Zip Code: 95131

Web Address: www.outreach1.org

Contact Person: Paul Tatsuta

Title: Community Transportation Manager

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Executive Director: Kathryn B. Heatley

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PROGRAM OVERVIEW

Program Name: Senior Transportation and Resource (STAR) Program

Location(s) where Sunnyvale clients will be served (include full street address(es):

Program services are provided to Sunnyvale seniors city-wide.

Brief Program Description:

Enter text here. **DO NOT EXCEED THE SIZE OF THE BOX.** Text will not print and your application will not be accepted. **This note applies to all boxes that allow multiple lines of text in this application.**

The STAR Program provides affordable, reliable and available transportation options for Sunnyvale seniors so that they can travel to destinations that support their efforts to live healthy and independent lives. Transportation options include: rider's fare subsidies to make the cost of riding the bus, light rail and paratransit services more affordable for lower income seniors, volunteer driver provided rides, shared rides/carpools supported by gas card or mileage incentives for drivers and door-to-door transportation provided by taxis or contracted transportation providers.

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SECTION 1: FUNDING REQUEST FOR SUNNYVALE PROGRAM

A. City of Sunnyvale Funding Categories (See RFP Notice, page 8). Please select one:

- Operational Emergency Seed Program

B. Consolidated Plan Priority Need Type.

Select only one:

- A. Basic Needs (Food, financial aid, emergency shelter)
 B. Youth Intervention (mentoring/after-school programs)
 C. Mental Health or Substance Abuse Counseling
 D. Other Supportive Services (Legal aid, senior care services, disability-related services, etc.)

C. Program Financials¹

Funding Request: \$40,000.00

Total Program Cost: \$1,010,000.00

Cost per client for proposed Sunnyvale Program: \$612.00

Number of Sunnyvale clients to be served: 160

Total matching funds for proposed Sunnyvale services: 970,000

Match Ratio (% of program funded by matching funds): 96%

Is Applicant currently receiving funding from Sunnyvale? Yes No

Has the Applicant applied for funds from the City of Sunnyvale for this Program before? Yes No

If yes, complete the following chart for the previous five years.

Fiscal Year Applied	Amount Requested	Amount Awarded by City
2011 (FY2011-12)	40,000	28,658
2010 (FY2010-11)	40,000	17,702
2009 (FY2009-10)	40,000	17,702
2008 (FY2008-09)	40,000	20,000
2007 (FY2007-08)	40,000	20,000

¹ NOTE: Please see pages iii-iv of Application instructions for details on how to calculate Program Cost and Cost per client

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SECTION 2: PROGRAM INFORMATION

A. Program Overview and Target Clientele

1. Provide a brief description of the proposed Program, including the specific services to be provided to Sunnyvale clients with funds from the City of Sunnyvale. Describe your target clientele in terms of age group, income level, household type, etc.

The Senior Transportation and Resources (STAR) Program addresses the need for affordable, reliable and available transportation for Sunnyvale seniors so that they can travel to destinations that support their efforts to live healthy and independent lives. The program employs a multi-modal approach to address senior's lack of transportation alternatives.

1. Public Transit: for seniors interested in using public transit, STAR provides individualized public transit plans to destinations of their choosing; group instruction on public transit use through the STAR Program's "Bus Buddy" project; and subsidized monthly transit passes or paratransit rider's fare subsidies for low income seniors.

2. Volunteer Driver/Shared Rides: lower-income seniors can earn a gas card that they can share with a friend or neighbor who volunteers to drive them to the senior center, senior nutrition program, medical appointments or other destinations. This benefit encourages friends and neighbors to travel together and help one another in a way that builds community and is environmentally responsible.

3. Subsidized Taxi Rides: for those older adults who are unable to benefit from the program's public transit or volunteer driver benefits, the STAR Program makes available a limited number of subsidized taxi rides that can be used to travel to health-related appointments or to access other community services. Whenever possible, these trips are combined into shared rides to reduce costs and increase program efficiency.

2. Describe the type of needs(s) that the proposed Program would address, its impact on Sunnyvale, and which need or objective of the City's Consolidated Plan it is primarily intended to meet.

The proposed project addresses the need for transportation assistance for seniors. According to the Consolidated Plan, transportation arose as a concern "particularly for seniors, the disabled", "As regional transit agencies face deficits and cut services, non-drivers face even more difficulty traveling around the County to meet their daily needs. Alternative options, such as paratransit, are particularly important to the elderly and disabled people, however, paratransit costs much more per trip than standard transit, therefore it is even more difficult to sustain service levels in difficult fiscal times" (pg 80). The Plan also identifies as an objective, "Support provision of essential human services, particularly for special needs populations" and prioritizes "very low, extremely low and/or special needs households (senior, disabled...). The Council at their December 19th, 2006 meeting, recognized "Transportation Services for Seniors, ... as an unmet need of the community due to gaps in services unavailable to residents, particularly seniors. Low-income seniors have no options for affordable transportation. Subsidized taxi or van rides have been discontinued for all low-income seniors". The STAR Program not only provides transportation that supports healthy & independent living, it also enables seniors to access other high priority services supported by the City and provided by local community-based organizations.

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3. Describe the Program's client eligibility requirements. Note if the clients are at-risk and/or an under-served population, and explain why.

The Senior Transportation and Resources (STAR) Program will limit program benefits to City of Sunnyvale residents whose household incomes do not exceed 80% of the Area Median Income and who are 62 years of age or older. STAR Program services will be available city-wide to all Sunnyvale residents who meet the age and income requirements of the program. Historically, the vast majority of the program's Sunnyvale participants receive incomes that are significantly less than HUD's extremely low income standard (i.e., 30% of Area Median Income). Older adults who are socially isolated are at-risk for declining health and institutionalization because lack of affordable transportation alternatives prevents them from accessing health services and opportunities to interact socially with others. Underserved populations frequently consist of older adults who are unaware of available services or unable to access such services because of language barriers or their lack of transportation to service providers. STAR's multi-lingual/multi-cultural staff actively targets these populations as program participants.

4. What other private or public organizations are now, or will be, addressing the same needs as the proposed program? List and describe the services provided by each agency to address these needs. Explain how the proposed program augments rather than duplicates the services of others. Describe how your agency collaborates with similar or complimentary service providers.

The Paratransit service is used by many seniors however, eligibility for this service is not based on age. Paratransit eligibility requires that an individual have a physical or cognitive disability that prevents them from using the bus and/or light rail system. Paratransit only operates when and where the bus and light rail systems operate and, as part of the public transit system, rider's are required to pay a rider's fare. The STAR Program complements the paratransit by providing transportation to older adults who are ineligible paratransit and by providing services when paratransit services are not available due to time or location. Additionally, STAR provides rider's fare subsidies for those seniors who have difficulty affording the paratransit rider's fare. STAR collaborates with volunteer driver services (e.g. Heart of the Valley, Love INC., etc), by providing transportation when volunteer drivers are unavailable or by referring seniors to these programs who need a higher level of assistance than STAR is able to provide. As the CTSA for the County, OUTREACH conducts regular meetings with community-based transportation programs to promote cooperation and collaboration between providers.

5. Describe any direct, quantifiable cost savings your proposed program would generate for the City, such as reducing a need for city services, (police, etc.). Attach any reports or other documentation supporting your estimates of city savings. Do not include cost savings to other public or private entities (county, state, federal agencies, or businesses).

The proposed project provides transportation services to Sunnyvale seniors at less than 1/2 the cost per client served compared to other county residents. Because of the City's contribution to the project's costs, the projected cost per Sunnyvale served by the STAR Program is \$250 compared to the program-wide projected cost of client served of \$612. This savings is made possible through the City's direct funding of the program which leverages other program funds and results in a greater number of Sunnyvale residents served by the program.

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6. Number of unduplicated clients estimated to be served by the proposed program in next fiscal year (must be consistent with Section 1.C).

Sunnyvale Clients: 160 Total Program Clients: 1650

a. If the agency currently receives Sunnyvale funding, will the amount requested for FY 2013-14 result in an increase in the number of Sunnyvale clients currently being served by the agency?

Yes No (If Yes, continue, if No, go to "B. Objectives")

b. How many additional Sunnyvale clients are expected to be:

Extremely Low Income _____ Very Low Income 19 Low Income: _____

Please complete the table below, using actual client data from prior years; only for the specific program for which you are requesting City funds:

Time Frame	Number of Sunnyvale Clients Served	Total Number of Clients Served	Amount of Sunnyvale Funding Received, if Any	Average Annual Program Cost Per Client
Average of past 5 years	131	1259	\$20,812.00	\$582.89
FY 2011-12	141	1410	\$28,658.00	\$596.65
Estimated for FY 2013-14	160	1650	\$40,000.00	\$612.12

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Please provide the number of unduplicated Sunnyvale clients served by income level and special needs, if any:

	2011-2012 Actual	2012-2013 Proposed		2011-2012 Actual	2012-2013 Proposed
	SUNNYVALE ONLY			SUNNYVALE ONLY	
Extremely Low Income (0%-30% AMI)			Youth (0-18 years)		
Very Low Income (31%-50% AMI)	109	65	Adults (19-61 years)		
Low Income(51%-80% AMI)			Seniors (62+ years)	109	65
Moderate Income (81%-120% AMI)			Disabled Individuals		
Above Moderate Income (120%+ AMI)			Other Special Needs		
Total	109	65	Total	109	65

B. Objectives

For each program objective, please indicate the proposed type and number of units of service to be provided during the next fiscal year. Units of service are those units that will be used to calculate program performance and justify reimbursement requests. You must include at least one type of unit, and may include up to four types.

Objective (unit of service) e.g. hours of service, meals provided, evictions prevented, etc.	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter	Annual
Number of one-way passenger trips provided	490	490	490	490	1960
Number of unduplicated Sunnyvale seniors	17	16	16	16	65

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C. Program Administration and Monitoring

1. Use the table and space below to briefly describe how the program will be managed and administered, including proposed staff time and staff functions.

Position Title	Program Duties	Total Annual Salary	Total Hours per Week	% Time Allocated to Sunnyvale Grant Activity	Amount of Salary to be funded by grant, if any
Senior Mobility Manager	Client recruitment & qualification, training, reporting	62,000	40	6%	3,686
Mobility Managers	Mobility option information, client based mobility plans, etc.	54,000	40	10%	5,400
Call Center Agents	Trip scheduling & monitoring	32,000	40	6%	3,200

The STAR Program is managed and administered as part of OUTREACH's Mobility Management Center. STAR Program activities are monitored regularly by the OUTREACH's management team that includes the CEO, Controller and Community Transportation Manager.

2. How will the effectiveness of your program be measured during each year of the grant?

The effectiveness of the project is measured quantitatively based on the number of qualified individuals enrolled in the program, number of active riders and the number of trips provided on a monthly or quarterly basis. The qualitative measure of the program is accomplished through the semi-annual survey of a random sample (10%) of active program participants to determine their satisfaction with the services rendered and the outcomes that are the result of the services provided through the STAR Program. Outcomes measures contained in the surveys include whether the participant feels that they are more "connected to people in the community who provide the services that I need", because of the services provided by the STAR Program, "my feeling of independence is improved" and "my ability to reach destinations that support my efforts to live a healthy life are improved".

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3. Describe your policies and procedures for assuring that people with disabilities and/or limited English proficiency have equal access to services and benefits. Attach your agency's Language Access Policy and disability-related policies, if any.

As the ADA paratransit service provider for Santa Clara County since 1993 and a recipient of federal financial assistance for over 30 years, OUTREACH has extensive experience working with persons with disabilities and/or limited English proficiency and has established procedures that promote equal access and quality of service to all of the agency's clients/customers. OUTREACH's written policies include: Non-Discrimination Policy, Access for Persons with Limited English and Persons with Disabilities, Equal Opportunity Environment, Code of Conduct, etc. Consistent with Executive Order 13166, OUTREACH has an approved Limited English Proficiency (LEP) Program that promotes access to OUTREACH services and benefits for individuals with limited English proficiency and offers translations of printed documents and electronic media, and utilizes in-house translators, the Language Line, TDD line and volunteer translators to assist individuals with accessing services

4. Provide a brief general description of your agency and the services it provides. Describe your agency's experience in providing the proposed services. If previously funded by the City, what goals and accomplishments were achieved with City funds?

OUTREACH has continuously provided transportation and case management services to the older adults and persons with disabilities in Santa Clara County since the 1970's. OUTREACH has served as the ADA paratransit broker for Santa Clara County since 1993 and has provided employment related transportation services to the County's Welfare-to-Work program's participants for over a decade. OUTREACH's efforts to coordinate transportation for older adults, persons with disabilities, homeless individuals, CalWORKs participants and other transportation-disadvantaged groups has been recognized by state and national transportation groups as one of the leading examples of mobility management in the nation and resulted in OUTREACH's designation as the County's Consolidated Transportation Services Agency in 2011. OUTREACH typically provides between 3,000 to 4,000 passenger trips daily to the agency's many clients. During the past five years (FY07/08 to FY11/12), OUTREACH has consistently exceeded all goals and objectives for City of Sunnyvale funded activities and during that time period provided over 20,000 passenger trips to over 650 Sunnyvale seniors.

5. Explain how your agency collects client eligibility and demographic data, consistent with CDBG requirements for public services programs. Attach a copy of your client application or income verification form.

Income and race/ethnicity data are self-reported as part of the STAR program's enrollment application. A copy of the STAR Program application is attached.

D. Consolidated Plan Goals

Please indicate which Consolidated Plan Goal(s) will be met by the Program and briefly describe how your Program meets the Goal(s).

- Goal #2:** Support activities to end homelessness
- Goal #3:** Support activities that provide basic services
- Goal #4:** Promote fair housing choice
- Goal #5:** Expand economic opportunities for low-income households.

Program addresses the basic need of "transportation" that is identified in the Consolidated Plan and the Plan's prioritization of services for "Very low, extremely low, and/or special needs households (seniors, disabled, etc)". The STAR Program meets this goal by providing cost-effective transportation options that enable program participants to travel to destinations in order to meet their basic needs - food, health care, specialized services, etc.

E. HUD Performance Measures

HUD required that recipients of federal funding assess the outcomes of their programs. Please identify which HUD objective and HUD outcome will be addressed by your proposal.

Objectives

- Objective #1: Creates a suitable living environment.** This objective relates to activities that are designed to benefit communities, families, or individuals by addressing issues in their living environment (such as poor quality infrastructure) to social issues such as crime prevention, literacy or elderly health services.
- Objective #2: Creates economic opportunity.** This objective applies to the types of activities related to economic development, commercial revitalization, or job creation.

Outcomes

- Outcome #1: Improve availability/accessibility.** This category applies to activities that make services, infrastructure, public facilities, housing, or shelters available or accessible to low/moderate income people, including persons with disabilities. In this category, accessibility does not refer only to physical barriers, but also to making the affordable basics of daily living available and accessible to low/moderate income people where they live.
- Outcome #2: Improve affordability.** This category applies to activities that provide affordability in a variety of ways in the lives of low/moderate income people. It can include the creation or maintenance of affordable housing, basic infrastructure hook-ups, or services such as transportation or day care.

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SECTION 3: FINANCIAL AND OTHER ORGANIZATION INFORMATION

A. Agency Information

Non-Profit with 501(c)(3) Status : Yes _____

Faith-based organization: No _____

Community Based Development Organization (CBDO): No _____

Community Housing Development Organization (CHDO): No _____

Other Type of Organization: No _____

Describe: _____

DUNS Number: 868458360 _____

B. Total Agency Budget

	2012-13	2011-12	2010-11	2009-10
Administration	\$792,517.00	\$780,869.00	\$668,141.00	\$707,625.00
Fundraising	\$234,200.00	\$159,586.00	\$147,523.00	\$129,544.00
Proposed Program (Total Budget)	\$33,760.00	\$28,658.00	\$17,702.00	\$17,702.00
All Other Programs	\$29,249,603.00	\$22,532,022.00	\$23,727,455.00	\$28,354,066.00
Total Agency Budget	\$30,310,080.00	\$23,501,135.00	\$24,560,821.00	\$29,208,937.00

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C. Budget for Fiscal Years 2013-14 & 2014-15

Proposed Sunnyvale Program Annual Expenses*	City Funds	Matching Funds	Total
Salaries/Benefits/Payroll/Taxes	\$11,086.00	\$279,874.00	\$290,960.00
Office Supplies	\$173.00	\$1,842.00	\$2,015.00
Communication	\$470.00	\$11,855.00	\$12,325.00
Publications/Printing/Advertising	\$112.00	\$296.00	\$408.00
Travel	\$205.00	\$132.00	\$337.00
Rent/Lease/Mortgage	\$410.00	\$10,341.00	\$10,751.00
Utilities	\$216.00	\$5,450.00	\$5,666.00
Insurance	\$27.00	\$676.00	\$703.00
Equipment Rental/Maintenance	\$146.00	\$3,685.00	\$3,831.00
Audit/Legal/Professional Services (for CDBG portion only)	\$172.00	\$4,333.00	\$4,505.00
Direct Services (Funding for specific service, e.g. meal, ride)	\$26,983.00	\$599,499.00	\$626,482.00
Contract Services	\$0.00	\$0.00	\$0.00
Other	\$0.00	\$52,017.00	\$52,017.00
Total Expenses	\$40,000.00	\$970,000.00	\$1,010,000.00

* Round to the nearest whole dollar and include only expenses associated with proposed program and Sunnyvale clients.

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Proposed Funding Sources for Sunnyvale Program	Amount
City of Sunnyvale	40,000
Other Jurisdictions	
Foundation	
Individual Donations	20,000
Council on Aging	50,000
MTC Lifeline Program	900,000
TOTAL	1,010,000

1. Does your Organization have a HUD-approved indirect cost plan? Yes No
2. Does your agency charge any fees for the proposed Sunnyvale services? Yes No
3. If your organization is not leveraging the requested City funds with other funds, please explain why.

Not applicable