


COUNTY OF SAN MATEO
AGING AND ADULT SERVICES
MEMORANDUM

Date: January 8, 2001
Hearing date:

TO. Honorable Board of Supervisors
FROM: Charlene A. Silva, Director 
SUBJECT. Proposal to the State of California Department of Aging for the Long-Term Care (LTC) Innovation Grant

RECOMMENDATION

Adopt a resolution authorizing Aging and Adult Services to submit a proposal to the State of California Department of Aging for Long-Term Care (LTC) Innovation Grant

Background

In 1992 Aging and Adult Services (AAS) convened a broad-based group of seniors, persons with disabilities, caregivers and service providers to form the New Beginning Coalition. The mission of the Coalition was to improve the quality of life for San Mateo County's diverse population of older persons and adults with disabilities. The Coalition, in partnership with AAS, the Commission on Aging and the Commission on Disabilities, developed a strategic plan for services that provides direction for continued service delivery improvements. A key objective of the plan was to integrate home- and community-based services (HCB) along with acute medical and long-term institutional care. The Long-Term Supportive Services Program (LTSSP) was envisioned as the model to accomplish this objective.

In May 1999 Aging and Adult Services received a grant for \$50,000 from the California Department of Health Services for a Long-Term Care Integration Planning (LTSSP) Grant. Funds from this grant were used to develop a menu of services to be provided in LTSSP, and establish reimbursement rates for service providers; plan for and develop protocols for pre-admission screening to LTSSP, Care Coordination, Adult Day Care and Skilled Nursing Facilities; and develop a plan to enhance communication and service delivery among consumers, care coordinators and primary care providers.

The Governor's Aging with Dignity Initiative, established by the 2000-2001 State Budget Act, allocated \$14,250,000 in funds statewide for Long-Term Care Innovation Grants for the implementation and expansion of community-based adult care alternatives that will help adults with functional impairments and older adults to remain in the most enriching, least restrictive community-based setting for as long as they are able. The Initiative Grants have three different target areas: 1) Partnership Building and Planning Grants, 2) Innovative Coordination and Collaborative Partnership

Grants, and 3) Access for Special Population Grants. Aging and Adult Services in collaboration with SamTrans is applying for a Partnership Building and Planning Grant.

Discussion

Both the New Beginning Coalition Strategic Plan and the Long-Term Care Supportive Services Program (LTSSP) highlight accessible transportation as a key element in the development of an integrated community-based service system. To live independently and retain a connection to the community, seniors and adults with disabilities need viable transportation to medical appointments, shopping, social, family and religious activities. Currently, Aging and Adult Services and SamTrans are working on a strategic plan to develop accessible transportation for seniors and adults with disabilities. There is a two-pronged challenge in putting together a plan. First, how do we provide information about available services to the target population? Second, how can seniors and adults with disabilities make their service needs known? The intention of this grant is to expand our ability to solicit input from adults in the community who are not presently connected to our service system by using technology and the wealth of local media. A series of community forums will be conducted across the county to hear what seniors and adults with disabilities want and need from a transportation system. One forum will be videotaped, captioned in several languages for the hearing impaired, and shown on public access television. At the end of the video, viewers will be given an 800 number to call to provide comments and feedback. Community partners will handle responses in different languages.

As a condition for the grant, the California Department of Aging is requesting a letter of commitment from the Board of Supervisors. In the past The Board has been an enthusiastic supporter of long-term care integration and improving accessible transportation in the county. Again, we are requesting your support.

Fiscal Impact

The amount of the grant requested is \$93,760. This amount would meet all anticipated expenses. There is no impact on the county General Fund as a result of this action.

RECOMMENDED


HEALTH SERVICES AGENCY

RESOLUTION NO _____

BOARD OF SUPERVISORS, COUNTY OF SAN MATEO, STATE OF CALIFORNIA

RESOLUTION AUTHORIZING AGING AND ADULT SERVICES TO SUBMIT A
PROPOSAL TO THE STATE OF CALIFORNIA DEPARTMENT OF AGING
FOR A LONG-TERM CARE INNOVATION GRANT.

RESOLVED, by the Board of Supervisors of the County of San Mateo, State of
California, that

WHEREAS, this Board of Supervisors supports the development of community-based
adult care alternatives that will help adults with functional impairments and older adults remain
in the most enriching, least restrictive community-based setting for as long as they desire; and

WHEREAS, this Board supports the goal that allows consumers of publicly funded
long-term care services to remain an integral part of their family and community life; and

WHEREAS, this Board finds that new and effective long-term care alternatives will
benefit San Mateo County adults with functional impairments and older adults:

NOW, THEREFORE, IT IS RESOLVED that this Board of Supervisors is committed
to the principles of Long-Term Care and hereby authorizes Aging and Adult Services to apply
for a Long-Term Care Innovation Grant with the California Department of Aging.

LONG-TERM CARE INNOVATION GRANTS
COVER SHEET

Proposal Name Strategic Plan for Accessible Transportation Services (SPATS)

Specify Grant Funding Target Area

- Partnership Building and Planning Grants
- Innovative Coordination and Collaborative Partnership Grants
- Access for Special Populations Grants

Specify Dollar Amount Requested \$93,760

Geographic Area to be Served San Mateo County

Proposal Director's Name Charlene A. Silva

Mailing Address 225 37th Avenue

| | | |
|------------------|-----------|--------------|
| <u>San Mateo</u> | <u>CA</u> | <u>94403</u> |
| (City) | (State) | Zip Code) |

Telephone Number (650) 573-3910 Fax Number (650) 573-2193

E-mail Address CSilva@co.sanmateo.ca.us

Contact Name Stephen Juel Phone = (650) 573-2498

Contact Name Robert Fucilla Phone = (650) 573-2413

CDA will maintain contact to these two people during the grant proposal period

Fiscal Officer Name Jacqueline Toliver Phone = (650) 573-2383

Information and signature of person authorized to sign and submit the grant proposal

| | |
|--------------------------|---|
| Name (print) | Title |
| <u>Charlene A. Silva</u> | <u>Director, Aging and Adult Services</u> |

Signature 

Address 225 37th Avenue, San Mateo, CA 94403

| | |
|-----------------------|-----------------------|
| Phone Number | Fax Number |
| <u>(650) 573-3910</u> | <u>(650) 573-2193</u> |

E-mail Address CSilva@co.sanmateo.ca.us

B TABLE OF CONTENTS

| | | |
|---|---|----|
| C | Executive Summary | 3 |
| D | Project Description | 5 |
| E | Scope of Work | 9 |
| F | Budget | 30 |
| | Budget Narrative | 34 |
| G | Proposal/Proposer Certification Sheet | 38 |
| H | Organizational Chart | 39 |
| | Aging and Adult Services Organization Chart | 40 |
| | SamTrans Organization Chart | 41 |
| I | Duty Statements of Key Personnel | 42 |
| J | Community Support and/or Commitment Letters | 43 |
| | SamTrans | 43 |
| | Commission on Aging Commission on Disabilities and New Beginning Coalition | 45 |
| | Paratransit Coordinating Council | 47 |
| | Key Collaborative Partners | 49 |
| K | Board of Supervisors Resolution | 54 |
| L | Accounting System | 57 |
| M | Vendor Data Record (Not applicable) | |
| N | Certification Clause | 58 |

C. EXECUTIVE SUMMARY

Elderly individuals who can no longer drive and adults with disabilities who must rely on public transportation disabled adults require reliable accessible transportation in order to meet their needs and maintain themselves independently in the community. At a minimum their needs include medical rehabilitative recreational and socialization services and opportunities. They also need to be able to attend to necessities such as grocery shopping trips to convenience stores and the like. The absence of this type of mobility and independence is a leading reason elderly and disabled adults deteriorate and are placed in skilled nursing facilities and other restrictive environments.

The San Mateo County Health Services Agency's Aging and Adult Services (AAS) Division in collaboration with SamTrans the County's public transit agency is submitting this application for Target Area 1 funding in the amount of \$93,760 to support the Strategic Plan for Accessible Transportation Services (SPATS) for elderly and adults with disabilities. The application has the support and participation of the County's New Beginning Coalition a group of providers and consumers from the aging and disabilities communities that was established to develop and serve as a central clearinghouse on the implementation of the County's Strategic Plan for Services for Older Adults and Adults with Disabilities.

The grant's purpose is to survey the needs and un- and under-served populations and create an enhanced transportation plan that meets the access needs of all County residents. The project's goal is to reduce the number of instances in which elderly and disabled adults are placed in institutional care because the County lacks the accessible transportation alternatives to link them with services to help them maintain their independence.

The proposed project builds on existing planning efforts and addresses Goal 3 Objective of the County's *Strategic Plan for Services for Older Adults and Adults with Disabilities 2000 – 2005*.

To provide an accessible transportation system that is client-centered sensitive to disability and culture reliable safe recognizes access to services as crucial recognized transportation as an integral component of the service delivery system and includes new and innovative transportation services for seniors and adults with disabilities.

The project includes the participation of SamTrans (San Mateo County Transit District) as well as the support and participation of the San Mateo County Commission on Aging Commission on Disabilities SamTrans ADA Citizen's Advisory Committee and the San Mateo County Para-transit Coordinating Council.

SPATS brings an innovative strategy to the proposed project. A grant-supported transportation planning consultant will work with a network of community-based organizations to identify and survey underserved elderly and disabled adults to identify

their transportation needs. San Mateo County has already surveyed consumers and now needs to identify who isn't being served, why, and what their transportation needs are. Planners will work with key informants (e.g. the staffs of community-based agencies that serve families, immigrants, ethnic minority communities, as well as the elderly and disabled adults, senior center staff and volunteers, clergy, physicians with geriatric practices, businesses, community and neighborhood leaders, and school personnel) to identify the underserved population and develop culturally based strategies to engage them in the planning process.

The project will incorporate electronic media in the gathering and dissemination of information. The County does not have a lot of good information regarding its underserved populations. These include, among others, individuals who are not connected to service organizations as well as others who are concerned with confidentiality and who do not want to possibly stigmatize themselves. The confidentiality provided by 800 numbers and a website should encourage many to come forward who otherwise wouldn't. Videotaping, captioning, and dubbing will create an efficient means of reaching a larger segment of the target population, such as the hearing impaired. Tapes will be broadcast on public access TV, highlights can be incorporated into foreign language (e.g. Cantonese, Spanish, and another language), cable newscasts, and public affairs broadcasts (AAS staff has developed relationships with producers of these newscasts) and they can be played for individuals or larger facilitated groups at a number of venues in the community. Third, and though perhaps not an innovation *per se*, the County is strongly committed to implementing the recommendations of the enhanced plan.

The project targets underserved elderly and disabled adults countywide, but will focus on six areas and communities: Coastside, Daly City, the South County communities of East Palo Alto, the Belle Haven neighborhood of Menlo Park, unincorporated North Fair Oaks, and east Redwood City, North Central San Mateo, San Bruno, and South San Francisco. The project will integrate technology into outreach strategies that build on the unique cultural strengths of the target communities. The planning process will feature public forums, at least one of which will be taped, edited, close captioned, and dubbed in Cantonese, Spanish, and Tagalog for viewing at providers' facilities and on public access TV. Both attendees of the forums and those who view taped versions later will be able to respond via the telephone, Internet, and e-mail. Staff will also conduct outreach to individuals and small groups of elderly and disabled adults to identify their needs. Key informant interviews of service providers will provide information on the needs of consumers who cannot attend the forums or who have difficulty articulating their needs (e.g. persons with language barriers, developmentally disabled, seriously mentally ill, residents of skilled nursing facilities). Questions from the forums will be placed on a multi-language website and 800 numbers will be established to encourage the participation of monolingual and limited English-speaking elderly and disabled adults.

D. PROJECT DESCRIPTION

1. **Indicate project name and dollar amount requested.** The name of the project is the Strategic Plan for Accessible Transportation Services (SPATS) for older adults and adults with disabilities. The amount requested is \$93,760.

2. **Describe project.** The San Mateo County Health Services Agency's Aging and Adult Services (AAS) Division in collaboration with SamTrans, the County's public transit agency, is submitting this application for Target Area 1 funding. The application has the support of the New Beginning Coalition and its 20 member agencies and their constituencies: the San Mateo County Commission on Aging, Commission on Disabilities, SamTrans ADA Citizen's Advisory Committee, and the San Mateo County Para-transit Coordinating Council. Strategic planning for transportation began in San Mateo County in 1992 with the formation of the New Beginning Coalition, a partnership between AAS, public and community-based organizations. The Coalition is dedicated to the development and implementation of a comprehensive countywide strategic accessible transportation plan for the elderly and adults with disabilities. Because of its membership size, New Beginning serves in many ways as AAS' eyes and ears in the community and helps focus much of AAS' work. The Coalition developed a five-year plan in 1995 and recently revised it for the years 2000-2005. In the process of the Plan revision, the Coalition conducted 25 community focus groups and obtained substantial public input. AAS and the Coalition, however, believe the process was incomplete and that public input came from the same groups and individuals that address similar forums and did not include the viewpoints of underserved populations.

The purpose of this grant is to survey the needs of un- and under-served populations and create an enhanced accessible transportation plan that meets the needs of all County residents. The project's goal is to reduce the number of preventable instances in which elderly and disabled adults are placed in long-term care through the development of a comprehensive and accessible transportation system for the elderly and disabled adults.

One of the proposed plan's key strengths is that it flows from goals and needs already identified in the County's *Strategic Plan for Services for Older Adults and Adults with Disabilities 2000 - 2005*. Goal 3, *Promoting Accessibility and Independent Living*, outlines the Plan's intent:

To maximize the independence of seniors and adults with disabilities by promoting affordable accessible housing and transportation in safe environments and enduring physical and programmatic access to community-based services and supports.

While Objective 2 of the Plan promises

To provide an accessible transportation system that is client-centered, sensitive to disability and culture, reliable, safe, recognizes access to services as crucial

recognized transportation as an integral component of the service delivery system and includes new and innovative transportation services for seniors and adults with disabilities

The proposed project is designed to achieve Objective 2

The project is further strengthened by SamTrans (San Mateo County Transit District) participation in transportation planning. The Transit District views itself not merely as a transportation provider but as an integral member of the service system. Because of this, SAMTRANS not only brings needed resources to the project but a commitment to implementing the findings of the survey as well.

The target population consists of underserved elderly and adults with disabilities. It includes large numbers of African-American, Asian/Pacific Islander, and Latino residents, many of whom are linguistically, culturally, or geographically isolated, as well as homeless persons, persons living with HIV/AIDS, the mentally ill, persons with disabilities, the developmentally disabled, and persons residing in skilled nursing facilities.

A grant-supported transportation planning Consultant will work with the Coalition and a network of community-based organizations to survey underserved elderly and disabled adults to identify their transportation needs and barriers they face and incorporate them into the Enhanced Strategic Five-year Plan. Staff will conduct a countywide outreach campaign to identify and contact underserved elderly and disabled adults, focusing on six areas and communities: Coastside, Daly City, the South County communities of East Palo Alto, the Belle Haven neighborhood of Menlo Park, unincorporated North Fair Oaks, and east Redwood City, North Central San Mateo, San Bruno, and South San Francisco. The project will integrate technology into outreach strategies that build on the unique cultural strengths of the target communities. The planning process will feature public forums, at least one of which will be taped, edited, close captioned, and dubbed in Cantonese, Spanish, and at least one other target language (e.g., Tagalog or Tongan) for viewing at providers' facilities and on public access TV. Both attendees of the forums and those who view taped versions later will be able to respond via the Internet, e-mail, and 800 numbers. Staff will also conduct outreach to individuals and small groups of elderly and disabled adults to identify their needs. Key informant interviews of service providers will provide information on the needs of consumers who cannot attend the forums or who have difficulty articulating their needs (e.g., persons with language barriers, developmentally disabled, seriously mentally ill, residents of skilled nursing facilities). Questions from the forums will be placed on a multi-language website, and 800 numbers will be established to encourage the participation of monolingual and limited English-speaking elderly and disabled adults, such as individuals with hearing impairments.

Once data have been gathered, the Consultant will study responses to identify unmet needs, gaps in services, and barriers to services, develop a plan that addresses these needs, gaps, and barriers, and identify resources that can be used to address them.

Consumers will have input into the draft plan. The enhanced Plan will identify which needs gaps or barriers can best be addressed through funding and other resources (the Plan will identify potential sources of funding) which can be addressed through the reorganization of services and through the inclusion of new partners

3. Describe how this project is new and innovative; describe who will be served, what outreach efforts will be made, and describe the alternatives to nursing home placement. The Strategic Plan incorporates several levels of innovation. First it is a proactive attempt to identify and survey persons who are not a part of the current service system. San Mateo County has surveyed consumers and now needs to identify who isn't being served why and what their transportation needs are. Planners will work with key informants (e.g. the staffs of agencies that serve families immigrants ethnic minority communities as well as the elderly and disabled adults senior center staff and volunteers clergy physicians with geriatric practices businesses community and neighborhood leaders and school personnel) to identify the underserved population and develop culturally based strategies to engage them in discussions. Volunteers (many of them agency staff) will go to places frequented by older adults e.g. clinics medical buildings pharmacies cafes and coffee shops laundromats delicatessens libraries ethnic businesses and banks. Volunteers will discuss the planning process and obtain commitments from people to participate. These contacts will be followed with thank you notes as a courtesy. The Coalition is committed to seeing that the elderly and disabled adults are able to maintain themselves in the least restrictive environments. Meeting the target population's transportation needs will go a long way toward achieving this objective. But the coalition is also realistic understanding that this does not always mean the individual's home but might mean a board and care facility or skilled nursing facility which is why both are included in the proposed strategic planning process.

Second the project will incorporate electronic media in the gathering and dissemination of information. The County does not have a lot of good information regarding its underserved populations. Concerns for confidentiality frequently prevent people from identifying and possibly stigmatizing themselves. The confidentiality provided by 800 numbers and a website should encourage many to come forward who otherwise wouldn't. Videotaping captioning and dubbing will create an efficient means of reaching a larger segment of the target population. Tapes will be broadcast on public access TV highlights can be incorporated into foreign language (e.g. Cantonese Spanish and Tagalog) cable newscasts and public affairs broadcasts (AAS staff has developed relationships with producers of these newscasts) and they can be played for individuals or larger facilitated groups at a number of venues in the community. Third and though perhaps not an innovation *per se* the County is strongly committed to implementing the recommendations of the enhanced plan. Equally important some resources are already in place to implement the plan once it is developed.

4. Describe how the project fits the grant funding target area description. The proposed project fits under Target Area One Partnership Building and Planning Grants. The proposed grant will strengthen community partnerships and develop an enhanced Strategic Plan that will identify unmet needs gaps in services and gaps in information.

It will utilize existing collaborations and partnerships in the community to enable members of the service system to contact underserved populations describe available services and elicit their input into the design of an accessible transportation system that will meet their service needs. The project targets underserved populations many of whom are ethnic minorities and who live in less accessible areas of the County and have unique needs such as geographic limitations and linguistic/cultural-specific needs. It will also address access issues faced by disabled adults.

5. Describe the anticipated impact on the target population. The proposed project will gather vital information about the transportation needs of underserved elderly and adults with disabilities. This information will be used to enhance the County's strategic plan for accessible transportation. Planners expect the strategic plan will have five measurable impacts on the target population. First, it will provide opportunities for many isolated elder and disabled adults to socialize. Second, it will increase the target population's knowledge of the need for prevention and intervention services. Third, it will increase underserved populations' knowledge of where and how they can access these services. Fourth, it will lead to the creation of new transportation options that when implemented will provide underserved populations with access to these and other services. Fifth, the provision of services, socialization opportunities, and recreation should result in reduced or delayed placement in skilled nursing facilities.

6. Describe organization and location (include a description of the site)

The Aging and Adult Services (AAS) Division, which also serves as the local Area Agency on Aging, is the umbrella division within San Mateo County Health Services Agency for home and community based services for elders and adults with disabilities. AAS provides centralized information and referral assistance to seniors throughout the county including an emergency response component to reach and help elders in crisis 24 hours a day. AAS administers a number of programs in the community designed to prevent long-term care placement including In-Home Supportive Services, the Multi-Purpose Senior Services Program, the Public Guardian Program, the Representative Payee program, HIV/AIDS Waiver Program, Congregate Meals, Meals on Wheels, and Linkages (which help maintain adults with disabilities remain independent in the community).

AAS is located on the campus of the San Mateo County Health Center on West 37th Avenue in San Mateo. The division occupies offices on the first floor. There is over 13,000 square feet of office space, client service space, and conference rooms. The site is accessible by fixed route bus services and because it is on the Health Center campus, it is a frequent stop for Redi-Wheels and other transportation services.

E. SCOPE OF WORK

1. Define needs, problems, service gaps and barriers in the service area.

As San Mateo County ages the number of seniors will be greater than the number of children. This year the median age reached 35.2 year of age as compared to 32.4 years in 1980. This trend is expected to continue until there is an upswing in the number of families and younger households in the County.

In 1990 the elderly in San Mateo County numbered 108,660 or almost 17% of the County's population. The Association of Bay Area Governments 1995 projections estimated the County's 60+ population at 119,800 a 10.3% increase in five years. Current estimates place the number of elderly at around 132,000. Within the senior population itself the largest population growth is expected to take place in the 85 and older group.

The composition of the San Mateo County's elderly is changing reflecting trends among the population as a whole. While whites constitute the overwhelming majority of the county's elderly population (age 65 and older) as a percentage of the total elderly population they declined from 77.4% in 1995 to 74.8% in 1998 a drop of 3.4%. Table 1 presents an ethnic breakdown of the County's 65 and older population.

**Table 1
Ethnic Composition of
San Mateo's Elderly Population**

| Ethnic Group | Percentage of Total |
|------------------------|---------------------|
| African-American | 3.3 |
| Asian/Pacific Islander | 12.1 |
| Latino | 9.1 |
| White | 74.8 |
| Other | 3 |

These figures reflect demographic changes that began in the 1990s as the Latino and Asian populations experienced much faster growth than White and African-American populations. The White population is also a much older population than those of other ethnic groups with 37.3% of Whites age 65 or older compared with 15.9% for African Americans, 14.3% for Asian/Pacific Islanders and 11.3% for Latinos.

Increasing age brings on a host of problems for persons regardless of race or ethnicity. The Institute for Health and Aging estimates that over half of Americans age 65 and older have some form of disability that limits their daily activity or mobility. Mobility is an aspect of the quality of life both for the elderly and the disabled. It is a necessary condition for independence and is closely linked to socialization opportunities, medical treatment, rehabilitation, public health and illness and injury prevention. Elderly individuals who possess or have access to means of transportation are able to take part in a greater share of activities and receive needed treatments and services to a far

greater extent than those who lack access. Unfortunately for those that lack access, the Nation's transportation system as a whole, and those of most communities, do not meet many of the mobility needs of normally aging people.

Data from the 1990 Census show that 19% of County residents age 44 and under have from some sort of disability. The major sources of the disabilities reported in these data include orthopedic impairments, developmental disabilities, skin and musculoskeletal impairments, respiratory diseases, and mental illness. Census data also show rates for reported mobility or self-care limitations (which is less-inclusive than the previous category). These rates ranged from a low of 8.3% and 7.9% for men and women 16 – 64 respectively, to highs of 36.3% and 37.9% respectively for men and women 57 and older. These data clearly show how limitations increase dramatically with age. Rates of reported limitations for all residents rose dramatically with age as Table 2 shows.

Table 2
Percentage of Population Reporting
Mobility or Self-Care Limitations
(Non-Institutionalized Populations)
1990 Census

| Age | Population | Persons Reporting Mobility or Self-Care Limitations | Percentage |
|--------------|----------------|---|--------------|
| 18-64 | 437,893 | 35,476 | 8.1% |
| 65-74 | 47,044 | 10,675 | 22.7% |
| 75 and older | 29,558 | 11,000 | 37.2% |
| Total | 511,495 | 57,151 | 11.1% |

Without access to transportation, the quality of life of elderly and disabled individuals frequently suffers and their physical, mental, and spiritual health decline. It is a downward spiral as problems increase in frequency and intensity until there is no alternative but to place the individual in institutional care, a condition from which few, if any, return.

San Mateo County's transportation system for the elderly and functionally impaired adults consists of several elements. These include:

- *Sam Trans Fixed Route Bus Service* includes 320 buses operating on 75 routes throughout the county and 50 shuttles from CalTrain stations to places of employment. All buses are kneeling and lift equipped. Many elderly and adults with disabilities are able to use regular fixed-route bus service.
- *Redi-Wheels Paratransit* provided by Sam Trans, the County's transportation system. The system was introduced in 1977 and is modeled on fixed-route service.

- How does Redi-Wheels inability to provide same day service affect underserved populations?
- What about frail elderly whose conditions require monitoring and thus disqualify them from Redi-Wheels but who are not severe enough for ambulance transportation? How many people does this affect and what are the alternatives?
- What about the needs of elderly persons who quit driving are unfamiliar with fixed route bus service may be but don't know if they are eligible for paratransit? What effect will they have on overall needs?
- What effect will increased commute traffic and congestion on highways County and city roads and streets have on the County's ability to meet the transportation needs of both underserved populations and current service recipients?

Economic issues are an important consideration. Non-White residents who are believed to make up a substantial part of the underserved population are far more likely to live in poverty than their White counterparts. One of the tasks of the planning process will be to determine what role economic status plays in a person's ability access transportation and other services and remain in the least restrictive environment.

Disabilities cut across both ethnic and economic lines. San Mateo County lacks information about the ethnic and economic composition of its disabled population (due in part to the reluctance of many disabled individuals to identify and possibly stigmatize themselves). Qualitative data indicate that a substantial number of disabled adults under age 65 live near or below the poverty level. This means they have access to fewer transportation (and service) options and are more than likely forced to rely on public or publically supported rather than private transportation.

Geographic isolation is another key issue. Although felt most strongly by residents of the Coastside, it is also an issue in parts of North and South County which have the largest concentrations of the County's poor. Despite the County's overall affluence, there are families that do not own reliable automobiles or own automobiles at all. These people live in areas of the County that are the poorest served by public transportation. Many people are probably not aware of paratransit and other options and thus are unable to meet many basic needs without taking several buses or relying on friends or relatives. Capturing the needs of these individuals will be key element of the enhanced transportation plan.

In addition to these concerns, there are special populations whose transportation needs are currently not fully known. These include persons with language barriers, the developmentally disabled, persons in skilled nursing facilities, the homeless, persons living with HIV/AIDS who are not receiving regular treatment, and the mentally ill. The County's current transportation system for the elderly and disabled adults has been structured to serve a predominantly White aging population. This is not a criticism, merely an acknowledgement that the needs of the majority of residents have been far

Trips must be prearranged. Redi-Wheels which uses 39 small buses, 21 vans with wheelchair ramps and 13 four-door sedans transports nearly 700 people a day taking them to medical appointments, on errands, or to recreational programs. Sam Trans added 19 new buses in 1999 that have high-backed seats, grab rails, updated lifts, and increased seating capacity. Redi-Wheels offers fare incentives to encourage non-peak hour usage and this year introduced a campaign to reduce lost service due to no-shows.

- *Health Plan of San Mateo* (the County's Medi-Cal program) operates *Health Rides* to take its members to and from medical appointments. *Health Rides* offers curb-to-curb service and is not equipped to transport persons in wheelchairs or who are on monitoring equipment.
- *Aging and Adult Services'* Transportation Officer arranges transportation for conservatees and Adult Protective Services clients.
- *Aging and Adult Services and Hospitals* provide clients and patients taxi vouchers—medical appointments.
- *American Medical Response* provides non-emergency medical gurney transportation for persons in wheel chairs or with monitoring equipment. Service is door-to-door and the carrier accepts third party reimbursement as well as private pay. Persons who are not Medi-Cal eligible and the poor are excluded from this form of transport.
- *FIS*— a community-based non-profit that serves the disabled, provides volunteer drivers who transport disabled persons to medical appointments, grocery shopping, and other necessities.

The strategic planning process will look at the newly identified needs of underserved populations in light of these current options to determine to what extent they affect underserved populations. Some of the gaps and barriers are global, i.e. they are a part of the larger transportation system. Others are specific to certain transportation alternatives. They include:

- Other than ambulances, there are few transportation options for persons with serious medical needs.
- Redi-Wheels is unable to serve the frail elderly who require monitoring equipment.
- Coastside Opportunity Center, which provides paratransit in Coastside communities (with a total base of 300 potential riders) is unable to meet demand.
- Redi-Wheels does not offer same-day paratransit services.

more extensively studied and as a result transportation and service systems are weighted far more heavily toward their needs than to persons of other races and ethnicities or even persons with disabilities regardless of ethnicity

One of the tasks of the strategic planning process is to identify both the underserved populations and their needs. AAS will compile data on who they are where they live the number that is disabled the extent of their disabilities what their service and transportation needs are whether these needs fall into existing gaps or encounter barriers whether these gaps result from a lack of knowledge of the services available access to services (physical or geographical) communications (e.g. developmentally disabled and seriously mentally ill persons) both of whom may require service providers (key informants) to provide information on their behalf or because they are no longer seen as part of the service population – elderly persons (virtually all of whom are disabled) who are in skilled nursing facilities. The latter might provide insights into not only their current transportation needs but some may be able to shed some light on how enhanced transportation might have prevented them from being placed in the first place. With these data AAS SamTrans and New Beginning Coalition can move forward to create an enhanced more inclusive accessible transportation plan for the elderly and disabled adults in San Mateo County.

2. List each key activity within your project and the timeline designated for each activity

a. Goals, Objectives, and Outcomes.

Goals: The goal of the proposed planning grant is to reduce the number of preventable instances in which elderly and disabled adults are placed in institutional care through the development of a comprehensive accessible transportation system for the elderly and disabled adults.

Objectives: The proposed planning grant has four (4) objectives:

1. Identify the County's underserved populations including special populations
2. Identify the needs of the underserved populations
3. Identify gaps in services and barriers to services
4. Develop an enhanced transportation plan that matches resources to address gaps in services and barriers to services

Outcomes: The proposed program has four (4) anticipated outcomes:

1. Improve access to transportation for underserved elderly and disabled adults
2. Improve the allocation of existing and future resources in order to better meet the needs of all elderly and disabled adults
3. Increase the numbers of elderly and disabled individuals who utilize the transportation system

- 4 Reduce the number of elderly and disabled individuals who are placed in skilled nursing facilities because they lacked access to transportation

b Implementation Schedule. The program's key implementation activities are listed in Table 3 (following page) Table 3 shows the activities person(s) responsible and time frame(s) in which AAS and the New Beginning Coalition expect to complete them

c. Key Activities.

i. Create an oversight structure that will provide supervision and support to the strategic planning process. Following acceptance of the grant by the Board of Supervisors the Health Services Agency will sign a contract for AAS AAS and Sam Trans will designate two key staff to provide overall supervision to the project. These will be an AAS Health Services Manager and Sam Trans Manager Accessible Transit Services They will in turn designate one staff person from each agency to provide coordination and logistical support to the planning process AAS will contribute a FTE Community Program Specialist III and Sam Trans an Accessibility Coordinator Both will devote 20 percent of their time to the project

The forum for planning will be the New Beginning Coalition which works in partnership with AAS and Sam Trans to improve the quality of life of older persons and adults with disabilities through the development and implementation of a comprehensive countywide strategic plan for seniors and adults with disabilities The Coalition's twenty members include all of the key public and private agencies serving the elderly and adults with disabilities in San Mateo County In addition County's Commission on Aging Commission on and Disabilities the SamTrans ADA Technical Advisory Committee and the San Mateo County Paratransit Coordinating Council will provide significant input and support for this project In concert with these advisory groups the Coalition developed a five-year Accessible Transit Plan in the 1995 and updated it in 2000 The proposed grant will enable the County to update the plan to include the needs (and strategies for meeting this needs) of underserved and special populations

The Coalition will review the action plan contained herein and identify strategies and timelines to implement it As part of its review the Coalition may amend the plan and timelines to meet emerging opportunities In order to develop a workable structure to implement the proposed work plan the Coalition will create an eight to 10 member Steering Committee The Coalition will ensure that the Steering Committee's membership includes all of the points of view necessary to provide a balanced approach to the project The Steering Committee will be small enough to avoid the logistical problems inherent in larger groups but will still be diverse and inclusive enough to ensure all major points of view are included The Steering Committee will meet semi-monthly or as frequent / as needed to ensure smooth implementation of the planning grant

Table 3
Key Activities and
Implementation Schedule

| Implementation Activity | Person(s) Responsible | Time Frame |
|--|--|---|
| Create an oversight structure that will provide supervision and support to the strategic planning process | AAS SamTrans New Beginning Coalition | February 2001 |
| Recruit and select a consultant to supervise planning data collection analyze data and prepare final report | Steering Committee | February – April 2001 |
| Initiate a public information campaign and outreach strategies to launch strategic planning process | Steering Committee Consultant | February – June 2001 |
| Develop and test survey questionnaire | Consultant Steering Committee | March 2001 |
| Hold up to five (5) public forums to elicit information about needs from the target populations | Consultant staff video producer | June July August September and October 2001 |
| Outreach to individuals who cannot participate in the forums (e.g. people with language barriers developmentally disabled individuals patients in skilled nursing facilities) using cable access TV/ small group forums and key informant interviews | Consultant staff of non-profits volunteers | November – December 2001 |
| Prepare and submit final plan | Consultant Coalition staff video producer | January – March 2002 |
| Implement first stage recommendations | Coalition AAS SamTrans | April 2002 |

ii. Recruit and select a consultant to coordinate planning, data collection, analyze data, and prepare final report. The Steering Committee's first major task will be to select a Consultant to serve as a temporary full-time staff person who will direct the planning effort coordinate data collection analyze the data and write the final report. The Consultant will report to the Steering Committee and coordinate activities with the Community Program Specialist III and Accessibility Coordinator. Recruitment of the consultant will begin in the project's first month and will be conducted area-wide. Requirements for the position will include an understanding of transportation systems and alternatives the needs of the elderly and adults with disabilities and the ability to work with the target population. Position announcements will be circulated within AAS and Sam Trans and posted with area transportation planners the Metropolitan Transportation Commission (MTC) and the Area Agencies on Aging in local counties. They will also be posted in the major media on computer billboards with disability advocates transportation agencies ethnic and language minority media and professional schools at areas colleges and universities. Position announcements will affirm that AAS is an equal opportunity employer.

The Health Services Manager and Director of Accessible Transit Services will conduct a paper screening of resumes to determine whether they meet eligibility requirements. Those that do will be forwarded to the Steering Committee to choose the persons it wants to interview. Staff will arrange interviews and members of the Steering Committee will sit as a personnel-screening committee to conduct interviews and forward their recommendations to the Steering Committee for ratification. Once the Consultant is selected the Committee and staff will conduct orientation so that the Consultant can assume direction of the planning process.

iii. Initiate a public information campaign and outreach strategies to launch the strategic planning process. This is one of the project's critical components. In order to be successful planners must be able to identify contact and survey un- and underserved populations. As pointed out above a number of these individuals are ethnic minorities many of whom are separated from the larger community by language culture and geography or have difficulty communicating or are in institutional placement.

One of the Coalition's goals is to develop a strategic plan that is as inclusive of all the needs in the community as possible. The project is targeting underserved elderly and disabled individuals throughout the County but as described below particular emphasis is being placed on underserved populations in certain communities. AAS SamTrans and the Coalition do not have a lot of affirmative information about the identity of underserved populations and their needs. This project is designed to identify these underserved populations and their needs. They are known to include (but are not limited to) ethnic minorities persons who are linguistically and/or culturally isolated individuals who are geographically isolated homeless persons persons living with HIV/AIDS the mentally ill persons with sensory impairments individuals with developmental disabilities and persons residing in skilled nursing facilities.

The planning process will examine and document the types of culturally specific outreach strategies that can be employed to improve service access and utilization. These include the use of cultural and family strengths in the African-American Latino and Asian/Pacific Islander communities to create informal support networks. A Physicians Forum held for The Blue Ribbon Advisory Planning Group (which designed an integrated community-health oriented care system responsive to South County's diverse cultures) recommended that successful interventions should build on the inherent cultural strengths in the African-American (church and kinship) Latino (extended family and spiritual supports) and Asian/Pacific Islander (family and community respect) communities and integrate these into services.

Staff and volunteers will conduct outreach to identify and contact underserved elderly and disabled adults who live throughout the county but will focus on residents of the target communities described below in #12: Coastside Daly City the south county communities of East Palo Alto the Belle Haven neighborhood of Menlo Park unincorporated North Fair Oaks and east Redwood City north central San Mateo San Bruno and South San Francisco. One of the project's unique features is its planned use of technology to reach the target population: features such as videotaping captioning and dubbing tapes for distribution and viewing through public access television and showings in the community particularly for people with language barriers and hearing impairments a website to encourage Internet responses and 800 numbers staffed by Cantonese Spanish and Tagalog speaking volunteers who will record callers' responses.

iv Draft, test, and finalize survey questionnaire. Another key step in the process will be the drafting testing and finalizing of the survey instrument that will be used in public forums and other venues to gather information. AAS SamTrans and the Coalition have a number of examples of questionnaires used in the past and have access to through its members and the advisory commissions a number of instruments used to conduct similar research. The Consultant will design a questionnaire that is open ended enough to elicit discussion but structured enough so even though it will be administered by an array of different people in vastly different settings it will nevertheless gather the essential information. Once the Consultant has designed the questionnaire and the Steering Committee has reviewed it staff will contact providers that serve the elderly and disabled and ethnic minorities (African-Americans Asian Latinos and Pacific Islanders) to provide access to small groups of clients with whom staff and volunteers can test the questionnaire. The test population will be as much like the anticipated targeted population as possible so their suggestions will help shape an instrument that succeeds in gathering valuable information.

Staff will also work with agencies that serve monolingual and limited English speaking populations in particular Chinese Pacific Islanders and Latinos. They will arrange to have the questionnaire translated into Cantonese Spanish and another language and have tapes of public forums dubbed and captioned and arrange for interpreters to help staff and volunteers collect information in other situations. Staff will also work with agencies serving the deaf and hearing impaired.

v. **Hold up to five (5) public forums to elicit information about needs of the target population.** The project will hold up to five (5) public forums to gather information from members of the target population. These will be held in the summer of 2001. SamTrans will host the first forum at its San Carlos headquarters. This forum will be videotaped, edited, and made ready for distribution at a variety of venues throughout the County. Some copies will be released in English. Others will be dubbed in Cantonese, Spanish, and Tagalog and close captioned for the hearing impaired. Eight hundred (800) numbers for voice and TDD will be set up in several areas of the County, staffed by English, Spanish, Cantonese, and Tagalog speakers to record viewers' responses. A four-language website will also be created because planners believe that a significant number of the target population, particularly the disabled, have Internet access. The Coalition will distribute the tapes to cable and public access TV outlets in the County so they can be shown on foreign language broadcasts and locally generated shows. The Coalition will also provide the tapes to senior centers, non-profit, and public agencies throughout the County that serve elderly and disabled clients for viewing and discussion by their clients. The Coalition will supplement these strategies by the use of linguistic and culturally specific approaches and outreach materials to reach special populations.

Innovation is woven into the fabric of the Strategic Plan. First, it is a bonafide attempt to identify and survey persons who are not a part of the current service system and determine their transportation needs. Most planning efforts survey consumers to determine ways in which they can serve them better. San Mateo County has already taken this step. Now it is time to take the next step - to identify those who are not being served, e.g., those needing escort services, why they're not being served, and identify their transportation needs. Planners will work with key informants (e.g., the staffs of agencies that serve families, immigrants, ethnic minority communities, as well as older and disabled adults, senior center staff and volunteers, clergy, people, physicians with large geriatric practices, businesses, community and neighborhood leaders, and school personnel) to learn where this underserved population is and develop strategies to engage its members. Volunteers (many of them agency staff) will go to places frequented by older adults: clinics, medical buildings, pharmacies, cafes and coffee shops, laundromats, delicatessens, libraries, ethnic businesses, and banks. Volunteers will discuss the planning process and obtain as many commitments as possible from seniors to participate.

The second innovative feature is the use of electronic media in the information gathering process. The County does not have a lot of good information regarding underserved populations. With respect to disabled individuals, concerns for confidentiality frequently prevent people from identifying and (in the minds of many) stigmatizing themselves. The confidentiality provided by 800 numbers and the website should encourage many to come forward who otherwise wouldn't. Videotaping, captioning, and dubbing will create an efficient means of reaching large numbers of people. Viewings can be facilitated or not depending upon the needs of the audience, and tapes can be viewed by a single individual or a dozen or more people. And viewings can conceivably be presented at any of the sights listed above. In addition, the

staff of Aging and Adult Services and Sam Trans has developed relationships with foreign language broadcasters (e.g. Cantonese Vietnamese Tagalog and Russian) to enlist their aid in airing information about the forums and to the extent possible editing and dubbing sections of tapes for inclusion in their news and public affairs broadcasts. Third and though perhaps technically not an innovation there is a very strong commitment in the County to developing and implementing this strategic plan. And perhaps equally important some resources are already in place to implement the plan once it is developed. The bulk of this outreach will be conducted by service agencies and augmented by direct outreach to places in the community frequented by the elderly and disabled.

The Coalition is committed to seeing that both elderly and disabled adults are able to maintain themselves in the least restrictive environments. Meeting the target population's transportation needs will go a long way toward achieving this objective. But the Coalition is also realistic in its views understanding that this does not always mean the individual's home. In some cases it will mean a board and care facility and in others a skilled nursing facility which is why residents of both are included in the proposed strategic planning process.

vi. **Conduct outreach to individuals who cannot participate in the forums (e.g., people with language barriers developmentally disabled individuals, patients in skilled nursing facilities).** Staff will work with several public and non-profit agencies to ensure that persons who do not attend forums or don't have other forms of contact with the process are not left out. Agency staff and volunteers will be enlisted (some have already agreed to participate) to serve as key informants. They will gather data about and in some cases on behalf of consumers who either cannot attend the forums or might not be able to participate fully in discussions. These include people with language barriers homeless persons mentally ill individuals residents of board and care facilities and skilled nursing facilities and developmentally disabled individuals. Staff will ask advocates and agency personnel to survey clients and to identify their needs. Staff and volunteers of service agencies (Self-Help for the Elderly and the Family Service Agency for example) and senior centers will assist with the public forums interpretation translation monitoring the website and answering calls to the 800 numbers. Public access and cable TV will play a significant role in helping to reach some of these isolated individuals.

vii. **Prepare and submit final report.** Following completion of the information gathering phase all of the responses will be collected and the Consultant will take the tapes and notes from the forums individual outreach and key informant interviews and together with the Community Program Specialist III and Accessibility Coordinator study them to identify needs gaps in services and barriers. The Consultant will draft a plan that addresses each of these areas and identify needs or gaps can be addressed through funding and other resources (and where possible they will identify potential sources of funding) through the reorganization of services or through the inclusion of new partners in the service system. The consultant will submit copies of the draft plan to a group of consumers AAS members of the Coalition Sam Trans the Commission on

Aging and Commission on Disabilities and the Paratransit Coordinating Council for review and comment. The Consultant will integrate their combined feedback in the final report which will be submitted to the Coalition Aging and Adult Services Sam Trans the Paratransit Coordinating Council and the Commissions before it is submitted to the Board of Supervisors and disseminated to the general public.

viii. **Implement first stage recommendations.** The report will prioritize recommendations based on need and on County's ability to implement them. The report will present service enhancements that the County can begin implementing prior to the expiration of the Planning Grant.

3. **Describe how each key activity meets and supports the project's goals and objectives.** Table 4 below shows the relationship between the project's objectives and the activities shown discussed above. All of the activities support the project's goal.

**Table 4
Objectives and Activities**

| Objective | Activity |
|--|---|
| Objective 1. Identify the County's underserved populations including special populations | <ul style="list-style-type: none"> ▪ Create an oversight structure ▪ Recruit a Consultant to staff planning campaign ▪ Initiate public information campaign and outreach strategies ▪ Develop and test questionnaire ▪ Hold up to five (5) public forums |
| Objective 2. Identify the needs of underserved populations | <ul style="list-style-type: none"> ▪ Initiate public information campaign and outreach strategies ▪ Develop and test questionnaire ▪ Hold up to five (5) public forums ▪ Outreach to individuals who cannot participate in public forums |
| Objective 3. Identify gaps in services and barriers to services | <ul style="list-style-type: none"> ▪ Hold up to five (5) public forums ▪ Conduct outreach to individuals who cannot participate in public forums ▪ Edit tapes and notes from forums, key informant interviews and individual outreach ▪ Prepare draft report ▪ Convene meetings with small groups of participants to review plan |
| Objective 4. Develop an enhanced transportation plan | <ul style="list-style-type: none"> ▪ Edit report ▪ Solicit member and consumer feedback ▪ Release final plan |

Identifying the County's underserved population will be preceded by creation of the oversight structure (staff and the Steering Committee) selecting the Consultant implementing the outreach campaign developing the test questionnaire and holding the public forums

Identifying the needs of underserved populations will be achieved by implementing the outreach campaign developing the test questionnaire holding the public forums and conducting outreach to individuals who cannot or do not participate in public forums

Identifying gaps in services will be achieved through the public forums conducting outreach to those who can't or don't participate in the forums (this includes the use of public access and cable TV a website and 800 number the dubbing and captioning of tapes for viewing for people with language barriers and the hearing impaired), and the drafting and review of the draft plan

Developing an enhanced accessible transportation plan will be achieved through editing the data collected through the forums and other outreach obtaining consumer feedback to the draft plan and releasing the edited plan

4. For each key activity, describe the desired measurable outcome and how it will be measured

Activity: Create an oversight structure that will provide supervision and support for the strategic planning process

- **Outcome:** To provide stable leadership and a planning process that is inclusive and represents all key interests and constituencies
- **Measurement:** Review of membership attendance participant feedback

Activity: Recruit and select a consultant to supervise data collection analyze data and prepare final report

- **Outcome:** To produce a high quality enhanced strategic plan for accessible transportation services
- **Measurement:** Review of milestones participant feedback plan's acceptance

Activity: initiate a public information campaign and outreach strategies

- **Outcome:** To inform the public in particular the target population of the planning process
- **Measurement:** Attendance at forums participant feedback

Activity: Develop and test survey questionnaire

- **Outcome:** To gather reliable data
- **Measurement:** The results of pre-testing the questionnaire, the degree to which the final instrument reflects participant input, and the quality of the final report

Activity: Hold up to five (5) public forums to elicit information and opinions from the target population

- **Outcome:** To gather data needed to define and support enhanced transportation services
- **Measurement:** The extent to which these data address gaps in services and other needs

Activity: Conduct outreach to individuals and small groups of seniors and disabled persons directly and through providers

- **Outcome:** To reach individuals who cannot attend the forums
- **Measurement:** Inclusion of the needs of persons with developmental disabilities and others who are unable to fully participate in forums

Activity: Prepare final plan

- **Outcome:** Identify unmet needs, barriers to services, and resources to address needs and barriers
- **Measurement:** Responses of consumers and providers

Activity: Implement first stage recommendations

- **Outcome:** To test enhanced plan's viability
- **Measurement:** Consumers' response to new services

5. Describe the viability of your project and its statewide applicability for replication.

The proposed program has broad support in both public and private sector agencies serving the elderly and disabled. The project's goal is to be able to identify the transportation needs of as many of the County's elderly and disabled as possible to ensure they receive the medical, rehabilitative, recreational, and socialization services required to live independently in the community, which will, in turn, reduce placement of both the elderly and disabled in institutional term care. The support and participation of Sam Trans, the County's transit system, is key. This ensures there is support for

implementing recommendations and findings at that level. The involvement and commitment of the Commission on Aging and Commission on Disabilities the Paratransit Coordinating Council Aging and Adult Services as well as two dozen service providers for both the disabled and elderly ensures there will be support at both the County and provider levels as well. All of these are extremely important and argue strongly that the project will be completed and the elements of the enhanced strategic transportation plan implemented.

Also important is the proposed planning grant's inclusiveness (it marks a sincere effort to combine innovative and culturally appropriate methods to reach out to seniors and disabled adults who are not being served bring them into the planning process using innovative methods removing language barriers facilitating the participation of the disabled identifying their needs and including those needs in an enhanced transportation plan). Finally the proposed use of technology to facilitate contact with the underserved and gather information provides the project with a strong underpinning in evolving practice and technology.

The proposed planning grant provides an extremely replicable example for other communities and counties faced with the same or similar or even different problems and its replicability is one of its most important features. It will provide an easy to follow strategy for other jurisdictions to follow to assess the needs of un- and underserved needy populations. The proposed strategies can easily be modified to meet local conditions.

6. Describe the population to be served and identify outreach method(s)

The population to be served consists of underserved elderly women and men and adults with disabilities. These are persons who may require medical rehabilitative recreational or socialization care to prevent their placement in institutional care. Transportation however is a prerequisite for many of them if they are to receive the care they need. Because of the neighborhoods in which they live a larger percentage of these individuals will be ethnic minorities (African-American Asian/Pacific Islander and Latino) than the County's elderly and disabled population as a whole. The largest numbers are expected to be Latino Filipino Chinese and Tongan.

The target population also includes the developmentally disabled homeless elderly and disabled individuals living with HIV/AIDS and other chronic conditions who may not be receiving regular care for these conditions and individuals who are already in skilled nursing level care but who nevertheless have transportation needs.

Outreach involves a number of strategies. These include:

- Enlisting the support of providers in the target neighborhoods to help identify underserved elderly and adults with disabilities.
- Using ethnic media including newspapers radio and public access cable TV.

- Going into neighborhoods to clinics, medical buildings, pharmacies, cafes and coffee shops, laundromats, delicatessens, libraries, ethnic businesses, and banks to approach people directly, and
- Enlisting the support of key informants (generally providers) to gather information on the needs of difficult to survey populations (e.g. the developmentally disabled, the homeless, and patients in skilled nursing facilities)

7. Describe the efforts to promote accessibility of services to adults with functional impairments and older adults.

Sam Trans will provide transportation to and from the public forums. American Medical Response will transport persons with monitoring equipment and in wheel chairs. All of the meeting sites will be accessible and equipped with assisted listening systems for the deaf and hearing impaired. Sign language interpreters will be available for the hearing impaired, and Spanish, Cantonese, and Tagalog interpreters will translate for Spanish, Cantonese, and Tagalog speaking participants. In addition, a website will be created so that disabled persons and seniors with internet access, who may not be able to attend the forums, can respond to the questions and provide their input. In addition, when the tapes of the first forum are edited and played on public access TV, 800 numbers staffed by volunteers from community-based agencies will be available to answer calls in English as well as Spanish, Cantonese, and Tagalog.

8. Describe the sustainability plan for your proposal's future success.

Implementation of the enhanced Strategic Plan for accessible transportation services is critical to the sustainability and success of this proposal. AAS and SamTrans believe three elements are key to successful implementation of the Plan. First, key agencies must make the necessary three to five year resource commitments to ensure success. Second, services must address the most important needs, not just those that are the least costly or easiest to implement. Third, consumers must have a continuing voice in the implementation and monitoring of services. The first and third conditions already exist. AAS, SamTrans, and Coalition members have already indicated their willingness to commit resources to the plan, and mechanisms for consumer feedback are already in place. The second condition will grow out of the final plan.

9. Describe your proposed plans for future funding beyond the grant seed money.

Aging and Adults Services (AAS) will pursue several options regarding future funding for the enhanced plan developed through the current grant. First, AAS will seek support from some of its current collaborative partners, such as Sam Trans, to provide the additional transportation identified through the planning grant. Second, AAS Division will seek to include coverage for new transportation services (beyond what Sam Trans can provide) under the Health Plan of San Mateo (HPSM). Third, the Division will apply for funding under future opportunities from CDA, if they are available. Fourth, the Division will apply for local funding from the Packard, Hewlett, The Peninsula Community Foundations, and other local and national foundations. Fifth, the Division will pursue state and federal initiatives.

10. Describe methods of self-evaluation including quality assurance activities and cost effectiveness

Aging and Adult Services and Sam Trans will conduct a process evaluation of the planning grant. The evaluation will be designed for two purposes: (1) to help the project assess progress and incorporate learning as it moves forward, and (2) to document the project methods for possible future replication efforts for parallel populations within the County or other areas seeking ways to enhance transportation for the same or similar populations. During the implementation phase, AAS and Sam Trans will document how the enhancements are implemented, levels of usage, and user satisfaction. AAS and Sam Trans will conduct an outcome evaluation after several years of operation in order to determine the extent to which enhanced transportation makes a difference in the rates of placement of at-risk elderly and disabled adults in institutional care. AAS and Sam Trans will seek local foundation funds to support this evaluation and contract with a local college or university or transportation planning firm for the study.

AAS and Sam Trans will assess quality assurance through several measures, including participant satisfaction surveys and focus groups of participants and collaborative partners. Inquiries will focus on the extent to which the project achieves its stated aims (e.g., inclusion of new populations), the extent to which it meets expectations and needs of both consumers and organizations that serve them, and the extent to which consumers' needs are accurately stated and prioritized in the enhanced plan and concretely linked to service strategies (e.g., the plan identifies a need for a certain service; does the enhanced plan identify resources that can support this need?).

AAS and Sam Trans will cooperate with CDA's external evaluation.

11. Describe how service to the under-served and special populations will be provided (e.g., directly or via subcontract).

Planning will be coordinated and directed by AAS and SamTrans as advised by the New Beginning Coalition and its Consultant who will serve as staff to the Coalition. AAS and Sam Trans will provide supplemental staff by making a Community Program Specialist III and an Accessibility Coordinator available, respectively, to assist with project logistics. Sam Trans will provide the facility for the first public forum. AAS contractors and other non-profits will participate voluntarily on a number of levels. Their staffs will serve as key informants in identifying underserved populations and helping identify needs of hard-to-contact populations. They will also serve as translators and interpreters.

12. Define and describe the geographical area to be served

The proposed project targets the entire County, but will focus particularly on six communities that are home to the majority of its ethnic minority residents. These include the areas about which the least is known in terms of the numbers of disabled and elderly and their needs. The communities are:

Coastside: This is a geographically larger and far more isolated area than either North County bordering San Francisco or the bayside communities that link together along

U S 101 Starting at Montara and moving south Coastside includes the towns of Princeton Half Moon Bay and Pescadero and the largely hilly areas west of State Route 35 until it reaches the Santa Clara and Santa Cruz county lines An estimated 3 000 to 4 000 farm workers and family members live and work on the area s isolated ranches and flower farms Public transportation is rudimentary within this area and the emphasis is on commuter transportation to take residents to and from population centers to the north and east. Most people rely on private automobiles rather than public transportation within this area Few farm worker families have access to consistent health care as a result of geographic and linguistic isolation Very little is known about the numbers of elderly and disabled persons among the area s farm workers and farm families or their service and transportation needs What is known however is that the Coastside Opportunity Center which provides paratransit in this community under contract to SamTrans is unable to meet demand

Daly City: Bordering San Francisco to its north Daly City is the County s most diverse community and with a population of approximately 104 000 it s the County s second largest city Demographic data from the 1990 Census show Daly City s ethnic composition was 42.3 per cent Asian/Pacific Islander 27.4 per cent White 22.4 per cent Latino/a 7.5 per cent African-American 0.3 per cent American Indian and 0.2 per cent other ethnic groups In the 1980s Daly City s Asian/Pacific Islander population increased by over 50 per cent and the Latino/a population more than doubled Filipinos comprise 27 per cent of the Daly City s population and Chinese 11.3 per cent In 1995 Daly City reported 29 350 households and 3.31 persons per household the second highest concentration in the County The estimated mean household income for residents of Daly City for the current year ranks slightly below other cities in North San Mateo County and San Francisco Less than 10% of the City s population is retired As with Coastside little is known of the needs of the community s seniors and disabled particularly within the Filipino Chinese and Latino/a communities

East Palo Alto/Belle Haven/North Fair Oaks/East Redwood City: The South San Mateo County communities of East Palo Alto the Belle Haven neighborhood of Menlo Park unincorporated North Fair Oaks and east Redwood City underwent dramatic changes in the 1990s Between 1990 and 1997 the population increased by 116 667 or 23% over 1990 levels Much of this growth was the result of Mexican and Central American immigration By 1997 36 660 Latinos comprised 31.4% of the population of these areas The 1997 estimates for other racial groups were 47.6% White 14.6% African-American 5.8% Asian/Pacific Islander and 0.6% Other In 1997 an estimated 51 675 persons or 44% lived at or below 200% of the poverty level A 1995 countywide health assessment found that 55% of over 700 Latino/a respondents were uninsured According to California Health Department statistics the number of Medi-Cal recipients in the area declined 15% between 1995 and 1997 In 1997 7 4466 persons or 6.8% of the area s residents were 65 years or older Of these residents 15.2% received Medi-Cal in addition to Medi-Care

The boom in nearby Silicon Valley fueled an increase in housing prices that gentrified some neighborhoods but drove and crowded lower income families into other

neighborhoods All of this points to a population that is increasingly defined by residents in low-paying service jobs with no health insurance who more likely than not are immigrants crowded into deteriorating housing or who have left welfare roles These conditions are ripe for chronic and communicable diseases as well as environmental health problems Because of the rapidity of this change service providers public as well as private have been hard pressed to keep track of the numbers and needs of the area's elderly and disabled adults The proposed strategic planning project will go a long way toward correcting this by reaching out to the area's growing Latino population

North Central San Mateo: A neighborhood in the City of San Mateo North Central's population of 6 894 people (1990 U S Census) is 32% African-American and 47% Latino Fifteen per cent of its residents live below the poverty level

San Bruno: San Bruno is a city of 41 450 located just south of South San Francisco San Bruno is home to a large Tongan population many of whom work in service jobs at San Francisco International Airport

South San Francisco: Immediately south of Daly City South San Francisco is an ethnically diverse city of 54 312 of whom 14 908 or 27% were Latino and 13 449 or 24 8% were Asian/Pacific Islander (1990 U S Census) Slightly more than 17% of the City's residents were at or below 200% of the poverty level. Like San Bruno many Latinos and Asians work in low paying service jobs at the hotels and restaurants near the San Francisco Airport or at the Airport itself

13. For each key activity identified, describe the collaboration efforts within your community (e.g., partnership, networking).

a. Create an oversight structure. The collaboration of all key public and private agencies serving the elderly and adults with disabilities is assured through the New Beginning Coalition The Coalition was formed in 1992 Its membership includes over 400 public and private agencies and consumers of service A partner of AAS the Coalition is the long-term planning body in concert with the Commission on Aging and the Commission on Disability who are advisors to the Board of Supervisors Paratransit Coordinating Council Sam Trans ADA Citizens Advisory Committee who advise the SamTrans Board of Directors The Coalition is charged with developing and implementing a comprehensive countywide strategic plan for seniors and adults with disabilities

b. Recruit and select a consultant to supervise planning, data collection, analyze data and prepare final report.

This activity will involve collaboration between the Coalition AAS Sam Trans and networking with area transportation planners the Metropolitan Transportation Commission (MTC) and the Area Agencies on Aging Administrators in local counties

c. Initiate a public information campaign and outreach strategies to launch strategic planning process.

This will involve AAS and SamTrans along with Coalition members networking with community-based non-profits that serve other target populations in the target communities

d. Develop and test survey questionnaire

This will involve the Consultant support staff and community-based agencies developing a questionnaire and convening a small group of the target population with whom to test the questionnaire

e. Hold up to five (5) public forums to elicit information and opinions from the target population.

This will involve collaboration between the Coalition AAS Sam Trans and a wide array of community-based agencies

f. Conduct outreach to individuals who cannot participate in the forums (e.g., developmentally disabled individuals, patients in skilled nursing facilities).

This will also involve collaboration between the Coalition AAS Sam Trans community-based agencies and cable and public access TV broadcasters

g. Prepare and submit final report.

This will involve collaboration between the Coalition AAS Sam Trans transportation planners and non-profit organizations

h. Implement first stage recommendations.

This will involve collaboration between the Coalition AAS and Sam Trans and networking with non-profits and other service providers

14 What specific actions and/or participation will be required from State, federal or other entities to implement the project, if applicable

In a project of this sort it is important that regional agencies such as the Association of Bay Area Governments (ABAG) and the Metropolitan Transportation Commission (MTC) are at least be informed of the project if not involved at some level. Residents of Daly City frequently have medical providers located in San Francisco. Many residents in South County travel to Stanford and other providers in Santa Clara County. For this project to achieve long-term success regional considerations are imperative. Public fixed route transportation has been regionalized to some degree through CalTrain and BART and regular SamTrans routes into San Francisco and Santa Clara Counties where they link with MUNI and the Santa Clara Valley Transit Authority respectively. ABAG and MTC may be the best forums through which the planning process and enhanced can be disseminated to neighboring counties so this type of service can be effectively regionalized.

15 What areas of State policy may be in need of revision to enable implementation or continuation of your project, if applicable.

The most important policy change would be the elimination of categorical funding. AAS sees long-term care integration and the Governor's Long-Term Care Council as

important steps toward achieving this goal. Public funding needs to be flexible so that it follows clients functional needs rather than categorical requirements. Such a change would enable local jurisdictions to provide truly individualized services that:

- Provide **accessible services in the most normalized environment** whether that is the home or another home-like setting
- Establish **partnerships with families** so a family's and individual's needs can be met in an holistic manner
- Conduct **strength-based, ecological-oriented assessments** that don't focus narrowly on pathology but consider all life domains and incorporate family and individual strengths in case planning
- Provide **culturally competent** services that ensure that disabled adults and elderly persons receive services that are sensitive and responsive to cultural differences and special needs
- Encourage **interagency collaboration and care coordination** among public and private service providers to eliminate service gaps, duplication, and barriers
- Provide **wraparound services** that effectively prevent unnecessary placement in restrictive environments, and
- Employ **flexible funding** to ensure services are provided on the basis of need, not simply eligibility for categorical funding

A service system established on these principles will enable local agencies to spend money more efficiently and create incentives on the front end to prevent placement, instead of being driven by reimbursement schemes that *de facto* favor placement.

LTC Innovation Grants Budget
For the Period of February 1, 2001 through June 30, 2002

PERSONAL SERVICES NOT APPLICABLE

| Salaries and Wages | | % | Fiscal Year | Fiscal Year | Total Budget |
|---|---------------|----------------|----------------|----------------|---------------|
| <u>Position Title or Classification</u> | <u>Salary</u> | <u>of Time</u> | <u>2000-01</u> | <u>2001-02</u> | <u>Amount</u> |
| _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |
| Total Salaries and Wages | | | _____ | _____ | _____ |

Staff Benefits (If you do not itemize or if you use a % of salaries explain in narrative)

| | | | |
|---------------------------------|-------|-------|-------|
| OASDI | _____ | _____ | _____ |
| Retirement | _____ | _____ | _____ |
| Workers Compensation | _____ | _____ | _____ |
| Industrial Disability Leave | _____ | _____ | _____ |
| Non-Industrial Disability Leave | _____ | _____ | _____ |
| Unemployment Insurance | _____ | _____ | _____ |
| Other (Specify in Narrative) | _____ | _____ | _____ |
| Total Staff Benefits | _____ | _____ | _____ |

TOTAL PERSONAL SERVICES

LTC Innovation Grants Budget
For the Period of February 1 2001 through June 30 2002

| OPERATING EXPENSES | Fiscal Year 2000-01 | Fiscal Year 2001-02 | Total Budget Amount |
|---|-------------------------------|------------------------|------------------------|
| Advertising | 100 | 400 | 500 |
| Dues and Subscriptions | | | |
| Office Supplies | 500 | 1,000 | 1,500 |
| Equipment | | | |
| Equipment \$5 000 or more | | | |
| Equip Rental Maint and Repairs | | | |
| Furniture | | | |
| Insurance | | | |
| Printing | | | |
| Photocopy | 250 | 2,250 | 2,500 |
| Communications | | | |
| Telephone | | | |
| Postage | | | |
| Travel | 62 | 648 | 710 |
| Training-Staff | | | |
| Facilities Space Rental or Lease | | | |
| Cost Rate _____ X Number of Sq Ft _____ | | | |
| Utilities | | | |
| Consultant Services-Interdept. | | | |
| Consultant Services-External | 17,150 | 50,100 | 67,250 |
| <u>Other Items of Expense List</u> | | | |
| Video Production & Copies | -0- | 10,000 | 10,000 |
| Use of Public Access TV | -0- | 10,000 | 10,000 |
| Refreshments at Community Mtgs. | 100 | 400 | 500 |
| TOTAL OPERATING EXPENSE | <u>continued on next page</u> | | |
| TOTAL DIRECT COSTS | | | |
| (Personal Services and Operating Costs) | | | |

LTC Innovation Grants Budget
For the Period of February 1 2001 through June 30, 2002

CONTINUED FROM P. 2A

| OPERATING EXPENSES | Fiscal Year 2000-01 | Fiscal Year 2001-02 | Total Budget Amount |
|---|------------------------|------------------------|------------------------|
| Advertising | | | |
| Dues and Subscriptions | | | |
| Office Supplies | | | |
| Equipment | | | |
| Equipment \$5 000 or more | | | |
| Equip Rental Maint and Repairs | | | |
| Furniture | | | |
| Insurance | | | |
| Printing | | | |
| Photocopy | | | |
| Communications | | | |
| Telephone | | | |
| Postage | | | |
| Travel | | | |
| Training-Staff | | | |
| Facilities Space Rental or Lease | | | |
| Dollar Rate _____ X Number of Sq Ft _____ | | | |
| Utilities | | | |
| Consultant Services-Intdept. | | | |
| Consultant Services-External | | | |
| <u>Other Items of Expense (List)</u> | | | |
| Meeting Room Rental | -0- | 800 | 800 |
| <hr/> | | | |
| <hr/> | | | |
| TOTAL OPERATING EXPENSE | <u>18,162</u> | <u>75,598</u> | <u>93,760</u> |
| | | | |
| TOTAL DIRECT COSTS | <u>18,162</u> | <u>75,598</u> | <u>93,760</u> |
| (Personal Services and Operating Costs) | | | |

LTC Innovation Grants Budget
For the Period of February 1, 2001 through June 30 2002

| | 2000-01 | 2001-02 | Amount |
|--|----------------|----------------|---------------|
| INDIRECT COSTS NOT APPLICABLE | | | |
| | | | |
| <u>CONSUMER SERVICE PURCHASE EXPENSES (List)</u> | <u>2000-01</u> | <u>2001-02</u> | <u>Amount</u> |
| NOT APPLICABLE | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| TOTAL CLIENT SERVICE/PURCHASE EXPENSES | | | |
| | | | |
| TOTAL GRANT COSTS | <u>18,162</u> | <u>75,598</u> | <u>93,760</u> |

A BUDGET NARRATIVE MUST BE PROVIDED FOR EVERY BUDGET LINE ITEM.

2. Budget Narrative

a. Personal Services:

No funds for personal services are requested. AAS and SamTrans however are contributing the following staff for the duration of the project. These are detailed below.

b. Operating Expenses:

Advertising costs will be used to promote and advertise community meetings and to encourage attendance and participation.

Office Supplies include paper pens folders nametags and other supplies to support the project.

Photocopying. \$250 is budgeted in year 01 and \$2 250 in year 02 to cover the cost of copying materials for community meetings and producing copies of the final plan.

Travel. Employees will be reimbursed for the use of their cars on county business at the rate of 31 cents per mile. AAS will reimburse the primary transportation consultant for the use of his/her personal automobile to conduct project business. Three hundred ten dollars (\$310) budgeted for these mileage expenses based on the following calculations: 200 miles in FY 2000-01 ($200 \times .31 = \$62$) and 800 miles ($800 \times .31 = \248) in FY 2001-02 for a total of \$310. An additional \$400 is included in FY 2001-02 for two staff to attend a meeting or training in Sacramento associated with the grant (\$100 mileage parking and tolls for trip from San Mateo to Sacramento plus lodging and meals @ \$150 per person).

Consultant Services External. Funds are requested to support the services of external consultants. The primary consultation service associated with this project is a transportation consultant to direct the planning effort and author the Enhanced Transportation Plan. Specific procedures are described under the Scope of Work and are consistent with policies established by the Health Services Agency and the County of San Mateo. The contract will be between AAS and the individual selected. Costs were calculated on a total of 450 total hours @ \$100 per hour: one hundred fifty (150) hours in FY 2000-01 and 300 hours in FY 2001-02 for a total of \$45 000 (450×100).

Other external consultant services include \$1 500 in FY 2001-02 for technical support necessary to tape the community meeting and interface with the cable television station (15 hours @ \$100 per hour) \$10 000 (\$2 000 in FY 2000-01 and \$8 000 in FY 2001-02) to be provided by community-based agencies for their assistance with language and outreach issues \$8 000 in FY 2001-02 for captioning services (captioning the video for hearing-impaired and in three languages (e.g. Cantonese Spanish, and Tagalog) \$2 000 for web page assistance and \$750 for translation services (sign language and other languages) at the community meeting (1 meeting @ \$150 in FY 2000-01 and 4 meetings @ \$150 each in FY 2001-02).

Total Consultant Services External for FY 2000-01 are budgeted at \$17 150 for FY 2001-02 \$50 100 is budgeted. Combined total budget for external consultant services is \$67 250

Other Items of Expense

Video Production and Copies AAS will contract with a video production company to tape edit produce videos of one or two of its public forums. Copies of the video (or videos) will be made for use on public access television as well as in the community.

Use of Public Access Television is budgeted at \$10 000 in FY 2001-02 based on an estimated cost of \$1 000 per hour show (10 shows @ \$1,000 per show for a total of \$10 000)

Refreshments at community meetings are budgeted at \$100 per meeting: \$100 in the first year and \$400 in the second year.

Meeting Room Rental. Funds are requested for the rental of meeting rooms for public forums and other outreach activities. Some meeting space such as the SamTrans Conference Room will be provided free. In other cases AAS will need to rent space from non-profit public or for-profit entities in the community. AAS estimates a total of four meetings in rented space in FY 2001-02 @ \$200 each for a total of \$800.

3. CONTRIBUTED SERVICES

a. Personal Services

AAS

(1) 15 FTE Community Program Specialist III

| | <u>2000-01</u> | <u>2001-02</u> |
|----------------|-----------------------------|----------------------------|
| Salary | 3 697 (base is \$4 929/mo) | 9 595 (base is \$5 331/mo) |
| Benefits (31) | <u>1 146</u> | <u>2 974</u> |
| Total | 4 843 | 12 569 |

(2) 10 FTE Health Services Manager I

| | <u>2000-01</u> | <u>2001-02</u> |
|----------------|-----------------------------|----------------------------|
| Salary | 3 144 (base is \$6 288/mo) | 7 904 (base is \$6 587/mo) |
| Benefits (31) | <u>975</u> | <u>2 450</u> |
| Total | 4 119 | 10 354 |

(3) 02 FTE Financial Services Manager II

| | <u>2000-01</u> | <u>2001-02</u> |
|----------------|---------------------------|----------------------------|
| Salary | 728 (base is \$7 282/mo) | 1 831 (base is \$7 628/mo) |
| Benefits (31) | <u>226</u> | <u>568</u> |
| Total | 954 | 2 399 |

| | | |
|-----------|-------|--------|
| TOTAL AAS | 9 916 | 25 322 |
|-----------|-------|--------|

| | | |
|---------------------|--|--------|
| TOTAL AAS FOR GRANT | | 35 238 |
|---------------------|--|--------|

SamTrans

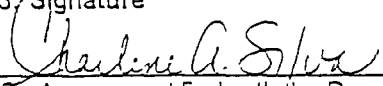
.20 FTE Accessibility Coordinator

| | <u>2000-01</u> | <u>2001-02</u> |
|----------------|-----------------------------|---------------------------|
| Salary | 4 125 (base is \$4 125/mo) | 10 296 (base is 4 290/mo) |
| Benefits (22) | <u>908</u> | <u>2 265</u> |
| Total | 5 033 | 12 561 |

TOTAL SAMTRANS FOR GRANT 17 594

Total Contributed Personal Services: 52,832

LONG-TERM CARE INNOVATION GRANTS
PROPOSAL/PROPOSER CERTIFICATION SHEET

| | | |
|---|---|---------------------------------------|
| 1 Company Name Health Services Agency Aging and Adult Services Division | 2 Telephone Number (650) 573-3910 | 3 Fax Number (650) 573-2193 |
| 4 Address 225 37th Avenue, San Mateo, CA 94403 | | |
| Indicate your organization type 5 <input type="checkbox"/> Sole Proprietorship 6 <input type="checkbox"/> Partnership 7 <input checked="" type="checkbox"/> Corporation | | |
| Indicate the applicable employee and/or corporation number 8 Federal Employee ID No. (FEIN) 94-6000-532 9 California Corporation No N/A 10 Required N/A | | |
| 11 Proposer's Name (Print) Charlene A. Silva | 12 Title Director | |
| 13 Signature  | 14 Date November 27, 2000 | |
| 15 Are you certified with the Department of General Services Office of Small Business Certification and Resources (OSBCR) as a Small Business Enterprise? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If yes, enter certification number _____ | | |
| NOTE: A copy of your Certification is required if the above item is checked. Yes. Date application was submitted to OSBCR if an application is pending. | | |

H. Organizational Chart.

Aging and Adult Services and Sam Trans organizational structures are described in the following paragraphs. Organization charts are attached and follow this discussion.

1. Aging and Adult Services is one of five (5) divisions of the San Mateo County Health Services Agency Aging and Adult Services (AAS) Division serves as the local Area Agency on Aging is the umbrella division within San Mateo County Health Services Agency for Home and Community Based Services to elders AAS provides centralized information and referral assistance to seniors throughout the county including an emergency response component to reach and help elders in crisis 24 hours a day AAS administers a number of programs in the community designed to prevent long-term care placement including Adult Protective Services In-Home Supportive Services (IHSS), the Multi-Purpose Senior Services Program (MSPP) the Public Guardian/Conservatorship Program the Representative Payee program AIDS/AIDS Waiver Program congregate meals Meals on Wheels and Linkages (which helps maintain adults with disabilities remain independent in the community). AAS also houses the Commission on Aging the Commission on Disabilities and the New Beginning Coalition

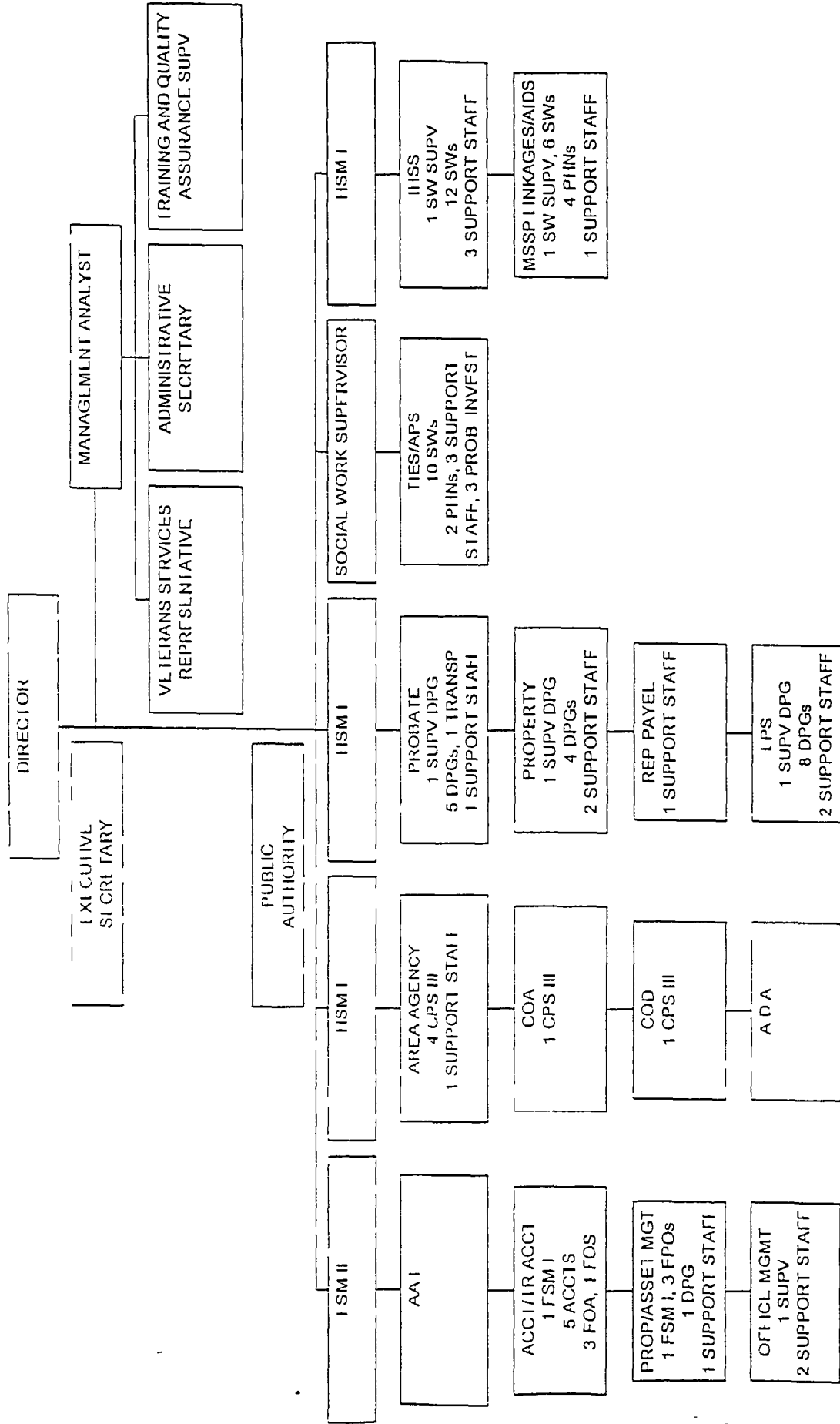
The Health Services Manager is one of five (5) section heads working under the Director He supervises the Area Agency on Aging and serves as staff to the Commission on Aging and Commission on Disabilities and coordinates County compliance with the Americans With Disabilities Act. The Health Services Manager will supervise the Community Program Specialist that will support the Consultant.

2. SamTrans (San Mateo County Transit District) was formed in 1974 and went into operation January 1 1975 In addition to providing fixed route transit system to 23 communities in an area of 446 square miles SamTrans also provides staff support to the San Mateo County Transportation Authority and the Peninsula Corridor Joint Powers Board which operates and administers CalTrain services

Sam Trans is governed by a nine-member appointed by Board of Directors The General manager directs day-to-day operations which are divided into six (6) divisions Accessible Transit Services is under the Executive Division and is overseen by the Manager Accessible Transportation Services who manages Redi-Wheels the District's paratransit system Redi-Wheels was introduced in 1977 well before passage of the Americans With Disabilities Act (ADA) in 1990 This was followed by additional service requirements and more stringent eligibility requirements.

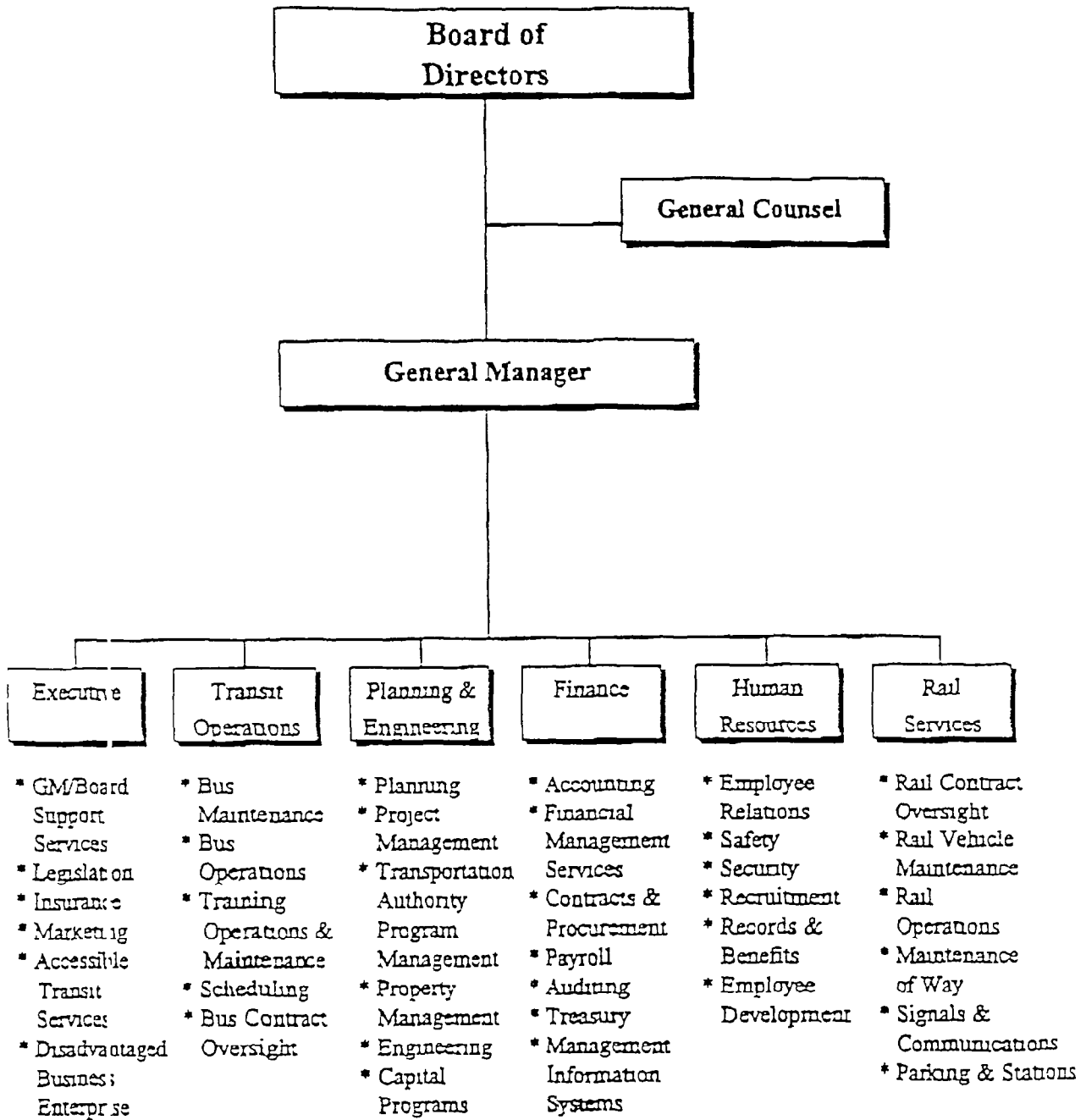
The Manager Accessible Transportation Services supervises the Accessibility Coordinator who will be SamTrans principal liaison to the planning grant and provide logistic support to the planning effort

AGING AND ADULT SERVICES



SAN MATEO COUNTY TRANSIT DISTRICT

General Organization Chart



I. DUTY STATEMENTS OF KEY PERSONNEL.

The proposed project is a partnership between AAS and Sam Trans. Since both agencies will contribute staff resources to the project to provide oversight and logistical support, those staff positions are described below. The Consultant, a grant-funded position, is also described.

a. Aging and Adult Services

i. **Program Services Manager.** (10 FTE) The Program Services Manager will supervise the project for AAS and be responsible for reporting to CDA, and developing cooperative working relationships with local providers, the community, and other stakeholders. The Program Services Manager will direct the recruitment of the Consultant and serve as liaison between AAS and planning agencies (e.g., MTC) and SamTrans.

ii. **Financial Services Manager.** (02 FTE) The Financial Services Manager will track expenditures of grant funds, prepare financial reports, and submit requests for reimbursement.

iii. **Community Program Specialist III.** (15 FTE) The Community Program Specialist will serve as liaison between AAS and the Coalition. S/he will be the principal contact between AAS and planning agencies (e.g., MTC) and community-based organizations involved in the forums and gathering information through key informants.

b. Sam Trans

i. **Director, Accessible Transit Services (check title).** (05 FTE) The Director, Accessible Transit Services will coordinate with the AAS Community Program Specialist III to ensure there is coordination between the two agencies in the implementation of the planning grant.

ii. **Accessibility Coordinator.** (10 FTE) The Accessibility Coordinator will provide logistical support to the project, assisting with the preparation of the Public Forums (purchasing snacks for participants, coordinating interpreters, video producer, making arrangements with special language cable stations, and other media) and providing support to the Consultant in the preparation of her/his report.

c. Planning Grant

i. **Consultant.** The Planning Consultant (18 FTE) will be the only position supported by grant funds. It will be an external consultant. The Consultant will be a transportation specialist and will have primary responsibility for organizing and directing the planning effort, conducting the needs assessment, and development of the enhanced transportation plans.

November 29, 2000

Shelly Thomas, RFP Coordinator
Long-Term Care Innovation Grants
California Department of Aging
1600 K Street
Sacramento, CA 95814

Dear Ms Thomas

The San Mateo County Transit District (The District) wholeheartedly supports San Mateo County Aging Adults Services' application for a Long-Term Care Innovation Grant in Target Area 1. The District has a long-standing interest in identifying and meeting the needs of elderly and disabled consumers. As a member of the New Beginning Coalition (a group of providers and consumers from the aging and disabilities communities) that was established to serve as a central clearinghouse on the implementation of the County's Strategic Plan for Services for Older Adults and Adults with Disabilities, and a partner with Aging and Adult Services in the planning of this application (and, hopefully its implementation as well), the District is strongly committed to the success of the proposed planning process.

The District and San Mateo County's Aging and Adult Services have entered into a partnership to develop the Strategic Plan for Accessible Transit Services (SPATS) for senior and individuals with disabilities: a ten (10) year transportation plan based on a social services model. SPATS will outline a continuum of transportation needs of transit-dependent seniors and individuals with disabilities, identify transportation options currently provided by public and private carriers, identify gaps between available options and needs, and develop strategies to meet those needs. This joint effort is a response to the ongoing issues and concerns relating to the availability and quality of accessible transportation and its key role in helping seniors and individuals with disabilities maintain their independence. SPATS is innovative in its commitment to include both key providers and underserved members of our community throughout the planning process. Special strategies have been outlined to ensure adequate input from underserved populations.

The District recommends SPATS for a Partnership and Planning Grant. The District believes SPATS implements Goal 3 of the Strategic Plan, Promoting Accessibility and Independence, and more specifically, Objective 2.

Shelly Thomas, RFP Coordinator
California Department of Aging
November 29, 2000
Page 2

Provide an accessible transportation system that is client-centered, sensitive to disability and culture, reliable, safe, recognizes access to services as crucial, recognized transportation as an integral component of the service delivery system, And includes new and innovative transportation services for seniors and adults with disabilities

The District is committed to this intensive planning effort to address one of the key factors in maintaining the independence and quality of life of seniors and adults with disabilities. By bringing all key stakeholders to the table, we know that they will be more effective in developing systems that meet the needs of the communities we serve. If the project is funded, the District is committed to providing staff and logistics assistance to ensure its successful completion.

The District appreciates the opportunity to lend our support and is hopeful that this project will receive your favorable consideration.

Sincerely,

A handwritten signature in black ink, appearing to read "Bill Welch". The signature is written in a cursive style with a large, sweeping initial "B".

Bill Welch
Manager, Accessible Transportation Services



HEALTH SERVICES AGENCY

Board of Supervisors:

Rose Jacobs Gibson • Richard S. Gordon • Mary Griffin • Jerry Hill • Michael D. Nevin
Health Services Director: Margaret Taylor

November 27, 2000

Shelley Thomas, RFP Coordinator
Long-Term Care Innovation Grants
California Department of Aging
1600 K Street
Sacramento, CA 95814

Dear Ms. Thomas:

The Implementation Coordination Committee (ICC) in San Mateo County is made up of the leadership from our Commission on Aging, Commission on Disabilities and the New Beginning Coalition (coalition of providers and consumers from the aging and disabilities communities). The ICC was established to serve as a central clearinghouse on the implementation of our Strategic Plan for Services for Older Adults and Adults with Disabilities. It is responsible for ensuring that information flows among represented groups, coordinating plan-related activities and monitoring the implementation of the Plan. With its broad-based representation of leadership, the ICC has been asked to review and support grant proposals for the "Golden Challenge Long-Term Care Innovation Grants Program" that are related to Plan implementation in San Mateo County.

The San Mateo County Transit District (SamTrans) and San Mateo County's Aging and Adult Services have entered into a partnership to develop the Strategic Plan for Accessible Transit Services (SPATS) for seniors and individuals with disabilities, a ten (10) year transportation plan based on a social services model. SPATS will outline a continuum of transportation needs of transit-dependent seniors and individuals with disabilities, identify transportation options currently provided by public and private carriers, identify gaps between available options and needs, and develop strategies for meeting those needs. This joint effort is response to the ongoing issues and concerns relating to the availability and quality of accessible transportation and its key role in helping seniors and individuals with disabilities in maintaining their independence. SPATS is innovative in its commitment to including both key providers and the community-at-large throughout the planning process. Special strategies have been outlined to ensure adequate input from underserved populations.

The ICC recommends SPATS for a Partnership and Planning Grant. It believes that SPATS implements Goal 3 of the Strategic Plan, Promoting Accessibility and

AGING AND ADULT SERVICES • PUBLIC GUARDIAN

225 - 37th Avenue • San Mateo CA 94403 • PHONE 650 573 3900 • TDD 650 573 2220 • FAX 650 573 2310
800 675 TIES (24 hour line to report abuse) • TDD 800 994 6166
<http://www.health.co.san-mateo.ca.us>

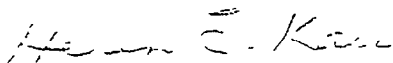
Shelly Thomas, RFP Coordinator
California Department of Aging
November 27, 2000
Page 2

Independence, and more specifically, Objective 2: Provide an accessible transportation system that is client-centered, sensitive to disability and culture, reliable, safe, recognizes access to services as crucial, recognizes transportation as an integral component of the service delivery system, and includes new and innovative transportation services for seniors and adults with disabilities.

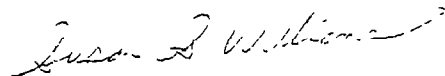
The staff of both Aging and Adult Services and SamTrans are committed to this intensive planning effort to address one of the key factors in maintaining the independence and quality of life of its seniors and adults with disabilities. By bringing all the key stakeholders to the table, we know that they will be more effective in developing systems that meet the needs of the communities they serve.

The ICC appreciates the opportunity to lend our support and is hopeful that this project will receive your favorable consideration.

Sincerely,



Helen E. Karr, Esq., President
Commission on Aging



Susan S. Williams, Ph.D., President
Commission on Disabilities



Susan Takalo, Co-Chair
New Beginning Coalition

cc:

Michael Scanlon, CEO, SamTrans

Charlene A. Silva, Director, Aging and Aging and Adult Services



November 29 2000

Shelley Thomas, RFP Coordinator
Long-Term Care Innovation Grants
California Department of Aging
1600 K Street
Sacramento, CA 95814

Dear Ms Thomas

The San Mateo County Paratransit Coordinating Council (PCC) represents residents of San Mateo County who, due to a disability, are unable to utilize the fixed-route services provided by the San Mateo County Transit District. The members of the PCC are volunteers from the local community including paratransit users, local social services agencies and transportation services providers. As an advisory body to SamTrans, the PCC makes policy and funding recommendations to SamTrans and the Metropolitan Transportation Commission (MTC). The PCC also advocates for the development and implementation of accessible transportation programs, which meet the transportation needs of people with disabilities throughout San Mateo County. With its representation of consumers, agencies and transportation providers, the PCC has been asked to support a grant proposal for the "Golden Challenge Long-Term Care Innovation Grants Program".

SamTrans and San Mateo County's Aging and Adult Services have been working together to address accessible transportation services in the County. As a result, the Strategic Plan for Accessible Transportation Services (SPATS) is being developed. SPATS is a ten (10) year accessible transportation plan for seniors and individuals with disabilities. The Plan will identify transportation needs and options for seniors and people with disabilities that are currently available in the public and private sector. Gaps between current options and needs will be identified and strategies will be formulated to meet those needs. Accessible transportation is a crucial issue for seniors and people with disabilities as they strive to remain as independent as possible in their community. Outreach will be a major component of the SPATS project in order to obtain input from communities, particularly underserved and un-served populations, agencies and key stakeholders.

The PCC is pleased to recommend SPATS for a Partnership and Planning Grant. It believes that this is a great opportunity to identify and put in place additional accessible transportation services in San Mateo County.

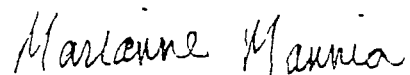
Both Aging and Adult Services and SanTrans are committed to ensure that quality, reliable and affordable accessible transportation is available to seniors and people with

Shelly Thomas, RFP Coordinator
California Department of Aging
November 29, 2000
Page 2

disabilities so that they can continue to live independently and take advantage of all transit dependent activities in the County

The PCC welcomes the chance to provide support to this project and hopes that it will be awarded funds to fulfill its mission

Sincerely,



Marianne Manna, Chair
Paratransit Coordinating Council

Key Collaborative Partners The following are members of the New Beginning Coalition and key collaborative partners in the proposed planning grant

A. Advisory Committees

San Mateo County Commission on Aging (CoA). The Commission on Aging is a 21-member group of professionals people with disabilities family members and others that advises the Board of Supervisors and advocates on behalf of children and adults with disabilities

San Mateo County Commission on Disabilities (CoD). The Commission on Disabilities is a 21-member group of professionals people with disabilities family members and others that advises the Board of Supervisors and advocates on behalf of children and adults with disabilities

The **Sam Trans ADA Technical Advisory Committee** advises SamTrans on policies plans and procedures related to the development implementation and operation of the District's accessible transit and paratransit services and on compliance with the requirements of the Americans With Disabilities Act of 1990

The **SamTrans Citizens Advisory Committee** helps the District plan a transportation system that is safe efficient cost-effective energy-efficient environmentally responsible and responsive to the needs of the broadest range of citizens and transit users in San Mateo County The focus of this committee is on issues of direct concern to users of fixed-route bus service

San Mateo County Paratransit Coordinating Council. This countywide council provides input to SamTrans the Board of Supervisors and other public bodies to ensure the interests of the elderly and mobility impaired are fairly represented

B Project Partners

Aging and Adult Services The county's Aging and Adult Services (AAS) Division which also serves as the local Area Agency on Aging is the umbrella division within San Mateo County Health Services Agency for home and Community Based Services to elders AAS provides centralized information and referral assistance to seniors throughout the county including an emergency response component to reach and help elders in crisis 24 hours a day AAS administers a number of programs in the community designed to prevent long-term care placement including In-Home Supportive Services the Multi-Purpose Senior Services Program the Public Guardian Program congregate meals and Meals on Wheels

New Beginning Coalition. New Beginning Coalition is a group of providers and consumers that works in partnership with Aging and Adult Services and community-based organizations to improve the quality of life of older persons and adults with

disabilities through the development and implementation of a comprehensive countywide strategic plan for seniors and adults with disabilities

Sam Trans (San Mateo County Transit District) was formed in 1974 and went into operation January 1, 1975. In addition to providing a fixed route transit system to 23 communities in an area of 446 square miles, SamTrans also provides staff support to the San Mateo County Transportation Authority and the Peninsula Corridor Joint Powers Board, which operates and administers CalTrain services. SamTrans is governed by a nine-member Board of Directors. The General Manager directs day-to-day operations, which are divided into six (6) divisions. Accessible Transit Services is under the Executive Division and is overseen by the Manager, Accessible Transportation Services, who manages Redi-Wheels, the District's paratransit system. Redi-Wheels paratransit services were introduced in 1977, well before passage of the Americans With Disabilities Act (ADA) in 1990.

C. Member Agencies of the New Beginning Coalition

The **Adult Day Health Council** is an ad hoc committee within the Commission on Aging. The council recommends organizations and groups to the State Department of Health that can be licensed to use Medi-Cal funds for the provision of adult day health care services to senior citizens in San Mateo County. It is also responsible for adopting an adult day health plan.

California Children's Services provides funding and case management for diagnosis and treatment for children 21 or under with potentially chronic disabling conditions. CCS also provides physical and occupational therapy for children age 21 or under with neuro-muscular, musculoskeletal or muscular diseases.

The **California Department of Rehabilitation** assists individuals with disabilities, emphasizing those with the most severe disabilities, toward informed choice and success in education, vocation, training, career opportunities, independent living, and the use of assistance technology to improve their lives. Services include counseling, medical services, and equipment assessment; vocational and on-the-job training; transportation assistance; work tools, equipment, and license fees; uniforms and safety equipment; and self-employment services.

The **Center for the Independence of the Disabled (CID)** is a non-residential independent living center organized and operated by people with disabilities to serve the disabled and frail elderly. CID provides counseling for individual, family, and couples, as well as peer counseling groups. Independent Living Skills provides evaluation, training, consultation, and equipment assistance, while First Step offers disabled adults an opportunity to live more independently. Other programs include the Personal Assistance Program, Client Assistance Program, Housing Accessibility Modification Program, Financial Benefits Counseling, and Shopping Assistance for Someone who is Homebound.

The San Mateo County **Community College District** offers a variety of services and programs to students and the general public. The District has a strong interest in

transportation issues that affect the ability of its adult disabled and elderly students to participate in educational activities

The **Golden Gate Regional Center** provides services to individuals diagnosed as developmentally disabled under State law. Services include diagnosis, counseling and assistance in arranging and paying for needed services such as infant intervention, 24-hour residential care, supported living services, respite care, genetic counseling, transportation, day activity and training programs, State developmental center admission and discharge planning.

Health Plan of San Mateo County/Advisory Committee is a special health plan created for San Mateo County Medi-Cal beneficiaries. The Advisory Committee, comprised of consumers and members of the general public, advises the Plan on a variety of consumer issues.

The **Joint Powers Board Citizen's Advisory Committee**, seeks the view of various groups of users and potential users of CalTrain and ancillary transit facilities and to develop proposals and recommendations for meeting the needs of these various groups, to review and comment on staff proposals and actions as requested by the Joint Powers Board, and to assist the Board in any matter which the Board may deem appropriate.

Kainos offers licensed residential homes (including independent living units) that provide living skills training for clients to live as independently as possible. A vocational program includes workshops, horticulture/landscape programs, and supported employment. Work training is individualized to help clients progress toward work in the community. Kainos also provides support groups for relatives and friends.

The **Legal Aid Society – Clients Rights Advocate** helps persons with disabilities with problems related to the Americans With Disabilities Act, transit and paratransit, the Golden Gate Regional Center, the San Mateo County Mental Health Division, and the Social Security Administration.

Peninsula Volunteers **Meals on Wheels** delivers hot meals to the homes of persons age 60 and over who are homebound and unable to prepare their own meals and have no one living with them able to prepare meals. Special diets are provided.

The **Metropolitan Transportation Commission's Elderly and Disabled Committee** advises MTC on actions related to transportation for elderly persons and people with disabilities, including access to transportation services and implementation of the Americans With Disabilities Act. Review MTC policies for the programming and allocation of funds for transportation services, reviews proposed MTC positions on relevant legislation, and provides comment on state and federal statutes affecting transportation services for the elderly and disabled.

The Catholic Charities Long-Term Care **Ombudsman** receives and resolves complaints made by or on behalf of long-term care facility residents. Staff visits facilities on an unannounced and regular basis and provides facility reports.

Parca serves as an advocate to persons with developmental disabilities regardless of family income. Advocates provide information and referral to educational, recreational, medical, and legal services and facilitate interaction with agencies and professionals. Parca also provides social groups, adult residential services, independent living skills training, conferences, and recreational programs, and numerous support groups for family members.

The **Peninsula Center for the Blind and Visually Impaired** provides services to visually impaired individuals. Services help them function more effectively and include specialized information and referral, training in activities of daily living, instruction in communication skills, mobility training (cane travel training), employment training, low vision optometric evaluation, individual and family counseling, and support groups. Most work is done in clients' homes.

Poplar ReCare. Poplar ReCare, the largest non-profit organization in San Mateo County, was formed in 1995 through the merger of Peninsula ReCare (formerly the Easter Seal Society of San Mateo County) and the Poplar Center. Poplar ReCare operates a number of programs to help persons with disabilities achieve their full potential and live as integrated members of the community. Staff members speak Spanish, French, German, Tagalog, Cantonese, Vietnamese, and Portuguese, facilitating services to the entire disability community.

The San Mateo County In-Home Supportive Services **Public Authority** provides personal care assistance and domestic services to financially eligible older adults and disabled adults who are unable to remain safely in their homes and are at risk of institutionalization without these services.

San Mateo County Medical Society has a strong interest in helping meet the transportation needs of elderly and disabled patients. The Society has provided support to private transportation initiatives.

The **San Mateo County Office of Education** acts as liaison between the state and 23 elementary, high school, and unified school districts in the County. The County Office is committed to meeting the education needs of all citizens of San Mateo County and is directly involved in transportation issues that affect its disabled students.

School Districts throughout the County have taken an interest in issues that affect the elderly and disabled adults. Special education programs provide a direct link between disabled students and adults with disabilities. Older school children volunteer at senior centers, providing invaluable services (e.g., reading) as well as companionship.

Service Provider Network Aging and Adults Services convenes the Service Provider Network on a quarterly basis to promote a partnership between the County and its contracting agencies. Meetings focus on a variety of subjects that promote better services and supports for seniors and adults with disabilities including information about emerging issues, funding, provider concerns, strategies for addressing agency issues, consumer issues, and updates about programs that affect community-based organizations and their clientele.

Multipurpose Senior Centers in San Mateo County offer a variety of activities and assistance to seniors. Staff and volunteers provide information about resources in areas such as housing, employment, household help, recreation, financial assistance, health services, in-home help, and transportation. Centers provide health education and screenings, noon meals Monday through Friday, in addition to brown bag lunches. Centers provide limited transportation to take participants to medical appointments and essential errands. Centers also offer a variety of recreational activities.

The **Veteran's Administration** offers a wide range of services to veterans including inpatient and outpatient medical and psychiatric services, rehabilitation, career assessment, vocational counseling, job search, skills training, and job placement. The VA is linked with the Employment Development Department (EDD), Department of Rehabilitation, and local community colleges to provide skills training, on-the-job training, and job placement for veterans. Transportation is a key issue for the VA because of the high number of disabled veterans living in the area.