

AGENDA

COMMUNITY SERVICES COMMITTEE

October 28, 2009

9:30 A.M.

**Laguna Woods City Hall
Council Chambers
24264 El Toro Road
Laguna Woods, CA 92637**

AGENDA DESCRIPTION: The Agenda descriptions are intended to give notice, to members of the public, of a general summary of items of business to be transacted or discussed.

Any person wishing to address the Community Services Committee on any matter, whether or not it appears on this agenda, may do so under the appropriate section of the agenda. Whenever possible, lengthy testimony should be presented to the Committee in writing (12 copies) and only pertinent points presented orally. Requests to speak to items on the agenda shall be heard at the appropriate point on the agenda; requests to speak about subjects not on the agenda will be heard during the **Public Comment** section of the meeting.

I. CALL TO ORDER

II. ROLL CALL

III. PRESENTATIONS

IV. COMMITTEE BUSINESS

A. 2010 Community Services Grants Recommendations

RECOMMENDED ACTION: Recommend that the City Council:

1. Award \$65,000 in competitive Community Services grants to six grantees: The Braille Institute (\$20,000), South County Outreach (\$20,000), Trauma Intervention Program (\$5,000), Laura's House (\$5,000), Dayle McIntosh Center (\$5,000), and Laguna Canyon Foundation (\$10,000).
2. Award \$75,000 in Community Services grants to South County Senior Services for:
 - a. Adult Day Health Care – \$22,500
 - b. Transportation Services – \$22,500
 - c. Florence Sylvester Memorial Senior Center – \$30,000

- B. Orange County Transportation Authority (OCTA) / Federal Transit Authority (FTA) Mobility Manager Grant

RECOMMENDED ACTION: Recommend that the City Council accept the Orange County Transportation Authority (OCTA) / Federal Transit Authority (FTA) Mobility Manager grant over two federal fiscal years (Oct. 1, 2009 – Sept. 30, 2011) and use \$23,000 from the unbudgeted General Fund balance to match the grant in FY 09-10.

V. SUBCOMMITTEE REPORTS

- A. Social and Health Services
- B. Arts, Culture & Recreation
- C. Community Relations
- D. Transportation Programs/Services
- E. Environmental Programs

VI. INTERACTION WITH COMMITTEES AND ORGANIZATIONS

- A. Environmental Committee
- B. Friends of the Library
- C. Chamber of Commerce

VII. PROJECT UPDATES

- A. OCTA Go Local Metrolink/Circulator Service Studies
- B. Street Improvement Updates
- C. Master Plan of Arterial Highways (MPAH) Extension Deletions

VIII. COMMITTEE MEMBER COMMENTS

IX. PUBLIC COMMENTS

X. ADJOURN

Next regular Community Services Committee meeting is scheduled for November 25, 2009

RECAP

COMMUNITY SERVICES COMMITTEE

Regular Meeting
August 26, 2009
9:30 A.M.

I. CALL TO ORDER

Meeting was called to order at 9:37 a.m. by Committee Member Dalrymple; Committee Chairman Levine arrived a few minutes late.

II. ROLL CALL

Present: Dalrymple, Lawyer, Levine, Margolis, Rhodes, Robeck, Sheppard

Absent: Gormin, Ratner, Rosenstein, Coles,

III. PRESENTATIONS

No presentations.

IV. COMMITTEE BUSINESS

A. Pilot Source Separated Recycling Program

Assistant City Manager Doug Reilly reviewed with the Committee the reasons for extending the pilot program for an additional 90 days. The Committee unanimously approved extending the pilot program for 90 days to test source-separated recycling at space or aesthetically challenging locations.

B. Integrated Solid Waste Management Franchise

Assistant City Manager Douglas Reilly reviewed with the Committee the report detailing the two options proposed for the Integrated Solid Waste Management franchise, which ends in July 2010.

1. Extend the franchise agreement with Ware Disposal, Inc., for five years, to July 2010, based on the offer of additional services or benefits proposal by the firm.

OR

2. Initiate a competitive Request for Proposal (RFP) process to solicit proposals for a new integrated solid waste management franchise to start in July 2010.

After review and discussion, the committee voted unanimously to recommend that the City Council extend the existing integrated solid waste management franchise with Ware Disposal Inc. for an additional five years.

- C. Orange County Transportation Authority (OCTA) Route Study Applications for Go Local Metrolink and Circulation Shuttle Services

Assistant City Manager Douglas Reilly updated the Committee on Go Local service options for study by the OCTA. These included adding a leg from the Moulton/Calle Aragon intersection, north on Moulton Parkway, east on El Toro Road, and south on Paseo de Valencia to the Laguna Hills Transportation Center before heading into Lake Forest and then to the Irvine Transportation Center. This addition was supported by the City Council when it approved the Transportation Needs Assessment/Go Local report in March 2009. An additional service proposal provides for a circulator shuttle to serve shopping centers along El Toro Road, from the Home Depot Center/Town Centre to the Laguna Hills Mall and into Lake Forest. Both are being proposed to the OCTA for further study.

V. SUBCOMMITTEE REPORTS

Representatives from the subcommittees gave a brief update on the status of their activities.

VI. INTERACTION WITH COMMITTEES AND ORGANIZATIONS

Chair Levine, who sits on two of the committees, gave a brief update on the their activities:

- Environmental/Greening the Woods Committee is considering a pilot program to recognize Laguna Woods Village manor improvements that conserve energy.

- Friends of the Library have a movie scheduled in September.
- Chamber of Commerce – no report.

VII. COMMITTEE MEMBER COMMENTS

No comments.

VIII. PUBLIC COMMENTS

No comments

IX. ADJOURN

Meeting adjourned at 11:25 am

The next meeting is scheduled for September 23, 2009

City of Laguna Woods Agenda Report

FOR: October 28, 2009 Community Services Committee Meeting

TO: Community Services Committee Members

FROM: Douglas C. Reilly, Assistant City Manager

Agenda Item: 2010 Community Services Grant Recommendations

Recommendations:

Recommend that the City Council:

- A. Award \$65,000 in competitive Community Services grants to six grantees: The Braille Institute (\$20,000), South County Outreach (\$20,000), Trauma Intervention Program (\$5,000), Laura's House (\$5,000), Dayle McIntosh Center (\$5,000), and Laguna Canyon Foundation (\$10,000).
- B. Award \$75,000 in Community Services grants to South County Senior Services for
- Adult Day Health Care – \$22,500
 - Transportation Services – \$22,500
 - Florence Sylvester Memorial Senior Center – \$30,000

Background

The City budgets \$150,000 annually for award of designated and competitive community services grants. The goal of the grant program is to fund programs and services that benefit residents or workers in the City and help non-profit organizations start up new programs that can eventually be self-supporting. The program is also to provide ongoing support to worthy programs, such as those provided by South County Senior Services (SCSS). The City Council adopted guidelines for the solicitation and award of the grants, and assigned the task of reviewing applications and recommending grant awards to the Community Services Committee.

ITEM IV-A.

This year, a public notice inviting applications for grants was published in the Laguna Woods Globe newspaper on July 23, 2009. Application packets were mailed to eighteen non-profit organizations that requested information. Ten applications, totaling \$172,000, were received by the August 31, 2009 deadline:

<u>Organization</u>	<u>Funding Request</u>
▪ The Braille Institute	\$20,000
▪ South County Outreach	\$20,000
▪ Saddleback Memorial Foundation	\$10,000
▪ Trauma Intervention Program	\$5,000
▪ Laura's House	\$5,000
▪ American Lung Association	\$15,000
▪ Pilgrimage Community Counseling	\$7,000
▪ Dayle McIntosh Center	\$5,000
▪ Laguna Canyon Foundation	\$10,000
▪ South County Senior Services	\$75,000

Discussion

On September 10 and September 18, the Social and Health Services (SHS) subcommittee reviewed nine applications for grant funding. One application will be evaluated by the Arts, Culture and Recreation (ACR) subcommittee before the Community Services Committee (CSC) on October 28. The SHS subcommittee recommends award of grants totaling \$130,000 to six applicants. Staff is recommending award of \$10,000 to one applicant, which will be discussed with the ACR subcommittee later this week. The subcommittee also recommended award of \$5,000 to South County Outreach more than the organization requested, but this is counter to long standing City Council policy. Attachment 1 summarizes the organizations and programs submitted for grant funding with recommended awards.

The following are grant recommendations for 2010 and the status of programs and services provided by organizations funded for the first six months of 2009:

1. South County Senior Services (\$75,000)

The SHS subcommittee is recommending that SCSS be awarded \$75,000 as requested. The City Council reserves this amount every year for SCSS. The grant will provide \$22,500 for transportation services, \$30,000 for the Florence Sylvester Memorial Senior Center, and \$22,500 for adult day care services.

ITEM IV-A.

The City restricts the use of City funds in transportation services and adult day services. Applications were reviewed to ensure compliance with the following conditions.

Transportation

- City funds are to be used exclusively for Laguna Woods' residents that are handicapped or economically disadvantaged and have no other options for transportation services.
- No City funds are to be used to subsidize transit services for Laguna Woods' residents that are physically and/or financially capable of using transportation services provided by the City, their residential communities or the Orange County Transportation Authority (OCTA).

Adult Day Services

- City of Laguna Woods' community services grant funding is specifically for scholarships to Laguna Woods' residents who are under financial constraints and not covered by insurance or any other funding source for adult day services.
- City grant funds are strictly prohibited from being used to subsidize the shortfall between fees for adult day service received from insurance, private pay or any other funding source and the total cost to South County Seniors to provide a day's service.

The SCSS transportation application includes the City conditions and its quarterly reports will provide the following information:

- Number of Laguna Woods' residents per trip that are handicapped or economically disadvantaged.
- Number of residents per shopper shuttle trip from the Whispering Fountains senior apartment complex.
- Criteria used to determine that residents of Laguna Woods using SCSS transportation services subsidized by City funds are handicapped, economically disadvantaged or have no other options for transit services.

Quarterly reports received to date have included compliance information.

Programs and Services Provided between January – June 2009

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Adult day services

A total of 145 additional days of service were provided for financially limited Laguna Woods residents who have no funding source or insurance coverage for additional days of health care services. This provided a respite from care-giving for 62 residents.

Transportation

There were 448 trips provided to handicapped or economically disadvantaged residents who have no other option for transportation service and 200 shopper shuttle trips were provided for residents of the Whispering Fountains senior apartment complex.

Florence Sylvester Memorial Senior Center

The senior center provided 4,556 congregate meals to 281 Laguna Woods' residents and 37,245 home delivered meals to 293 homebound seniors.

2. Braille Institute (\$20,000)

The SHS subcommittee is recommending award of \$20,000, as requested. The organization is providing an important service to visually impaired residents of Laguna Woods which helps them adjust to sight loss, remain independent and improve self confidence.

Programs and Services Provided between January - June 2009

All classes and services are provided without charge; 390 residents attended classes. Additional services provided included: 55 low vision consultations, 18 orientation and mobility trainings, peer counseling for 106 individuals, and balance and mobility training for 46 individuals at Las Palmas. Other services included: in-home visits, home orientation training, telephone training, multi-week class sessions, and coordinating and planning for a blind/low vision golf tournament in August.

3. South County Outreach (\$20,000)

The SHS subcommittee is recommending award of \$20,000, as requested. South County Outreach offers services and programs that provide emergency food, rental assistance, and utilities assistance to needy and low-income residents. Although the subcommittee would like to recommend an additional \$5,000 for this group, it runs counter to longstanding City Council policy.

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Programs and Services Provided between January – June 2009

Emergency food support was provided to 294 Laguna Woods residents, 4 residents received emergency utility assistance, 2 residents received rental assistance and 10 residents enrolled in a computer skills training program.

4. Trauma Intervention Programs (TIP) (\$5,000)

The SHS subcommittee is recommending funding of \$5,000 to conduct emotional first aid seminars to prepare residents to assist others in need of emotional support, distribute trauma intervention resources guides, recruit residents to become TIP volunteers and provide follow-up to TIP clients.

Programs and Services Provided between January – June 2009

TIP has conducted a 4-hour emotional first aid seminar and graduated 22 residents and is scheduled to conduct another seminar later this year. In the last 6 months, TIP has provided follow up services to 25 Laguna Woods residents, distributed 62 trauma resource guides, and distributed 150 TIP volunteer recruitment flyers throughout the City.

5. Laura's House (\$5,000)

The Subcommittee is recommending funding of \$5,000 for a program aimed at ending family violence in later life by providing clinical, psychological and educational services to seniors who are at-risk of abuse or its recurrence in a domestic setting.

Programs and Services Provided between January – June 2009

In the last 6 months, Laura's House has provided domestic violence counseling services to 3 residents of Laguna Woods, conducted an educational program at City Hall, and made contacts with the Village Social Services Department, South County Seniors, Laguna Woods's religious organizations and community clubs.

6. Dayle McIntosh Center (DMC) (\$5,000)

The SHS subcommittee is recommending award of \$5,000, as requested. The program, "Aging with Vision Loss," provides mobility training for seniors who are blind or visually impaired. It is the only program in Southern California that

ITEM IV-A.

provides seniors with vision loss supportive services in their homes. The Aging with Vision Loss program is primarily funded through the state Department of Rehabilitation for the next three years and has the potential to become a fee for service program. Based on this information, the subcommittee is recommending that 2010 be the last year of City grant funding for this program.

Programs and Services Provided between January – June 2009

In the last 6 months, Dayle McIntosh Center provided specialized services to 22 visually impaired or blind residents of Laguna Woods.

7. Laguna Canyon Foundation(\$10,000)

The Laguna Canyon Foundation is requesting \$10,000 for a program to recruit and train Laguna Woods' residents as members of its South Coast Wilderness Volunteers. One goal is to grow to 200 the number of active volunteers. A second goal is to add programs tailored specifically for seniors and their special needs. Staff is recommending award of the requested \$10,000. The ACR subcommittee will consider this application before the CSC meeting on October 28 and will provide a recommendation at that time.

Following Programs Not Recommended for Funding in 2010

8. Saddleback Memorial Foundation (\$10,000)

The foundation is requesting \$10,000 for salary and benefits relating to an existing staff position for the Heat Failure Disease Management Program. This program was implemented in 2007 with a \$10,000 Community Service Grant and continued in 2008 with another \$10,000 grant. No funds were requested for the program in 2009. The program is administered by the Clinical Resource Services Department at Saddleback Memorial Medical Center and is to be incorporated in the normal operation of that department. The SHS subcommittee is not recommending funding for the program in 2010.

9. Pilgrimage Family Therapy Center (\$7,000)

The Pilgrimage Family Therapy Center is requesting \$7,000 for Individual Therapy/Face Your Fear Groups. Over 60% of the requested funding is for the cost of facility maintenance, insurance and supervision. The SHS subcommittee is not recommending funding for this program.

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10. American Lung Association(\$15,000)

The American Lung Association (ALA) is requesting \$15,000 for a period of six months to develop and conduct an adult health “The Best Things in Life are Free: Breathing and Lunch” program. The program would conduct 8 workshops at community centers or places of business in Laguna Woods. In a six month period, ALA proposes to develop the program, gain commitments from 8 public or private agencies to co-sponsor the program, and then advertise and schedule the workshops. The SHS subcommittee felt that this program was too ambitious to accomplish successfully in 6 months and is not recommending funding in 2010.

All grant applicants were invited to attend the October 28, 2009 CSC meeting where they will be given the opportunity to provide additional information about their grant proposals.

Fiscal Impact

The Fiscal Year (FY) 2009-2010 budget approved by the City Council in June 2009 includes \$150,000 for community services grants. Approval of the recommended action will recommend allocation of \$140,000 by the City Council, leaving a balance of \$10,000.

Conclusion

Staff and CSC subcommittees have evaluated the applications for 2010 community services grants are recommending awards of \$140,000. The CSC’s recommendations will be forwarded to the City Council for consideration and approval at its November 18, 2009 meeting. Attachment 1 shows the organizations and programs submitted for grant funding with the recommended grant awards.

Attachment 1: Grant Funding Recommendations

ITEM IV-A.

2010 GRANT FUNDING RECOMMENDATIONS

ORGANIZATION	PROGRAM	AMOUNT	Recommendation
Braille Institute	Training for residents with sight loss	\$20,000	\$20,000
Trauma Intervention Program	TIP liaison conduct seminars, and train volunteers	\$5,000	\$5,000
South County Outreach	Community Outreach to assist low income residents with emergency food, rental assistance and utility assistance	\$20,000	\$20,000
Laguna Canyon Foundation	South Coast Wilderness Volunteers	\$10,000	\$10,000
Laura's House	End Family Violence in later life	\$5,000	\$5,000
Dayle McIntosh Center	Aging with vision loss mobility training for seniors who are blind	\$5,000	\$5,000
Saddleback Memorial Hospital Foundation	Heart Failure Disease Management Program	\$10,000	NOT RECOMMENDED
American Lung Association	The Best things in Life are Free: Breathing and Lunch	\$15,000	NOT RECOMMENDED
Pilgrimage Community Counseling	Individual Therapy/Face Your Fear Groups	\$7,000	NOT RECOMMENDED
	Total Requested Recommended	\$97,000	\$65,000
South County Seniors	Adult Day Services	\$22,500	\$22,500
South County Seniors	Transportation	\$22,500	\$22,500
Florence Sylvester Memorial Senior Center	Health and Wellness	\$30,000	\$30,000
	Total Requested and Recommended		\$75,000

Total recommended for grant funding: \$140,000

City of Laguna Woods Agenda Report

FOR: October 28, 2009 Community Services Committee Meeting

TO: Community Services Committee Members

FROM: Douglas C. Reilly, Assistant City Manager

Agenda Item: Orange County Transportation Authority (OCTA) / Federal Transit Authority (FTA) Mobility Manager Grant

Recommendation:

Recommend that the City Council accept the Orange County Transportation Authority (OCTA) / Federal Transit Authority (FTA) Mobility Manager grant over two federal fiscal years (Oct. 1, 2009 – Sept. 30, 2011) and use \$23,000 from the unbudgeted General Fund balance to match the grant in FY 09-10.

Background

In March 2009, the City Council approved the Transportation Needs Assessment/Go Local report for submission to the OCTA and applying for federal funds to establish a Mobility Manager to assist residents and workers in the use of transit services. The grant application was approved by the OCTA in July for work described in the attached scope of work (Exhibit A).

Discussion

When the City Council approved the application for the Mobility Manager, it was envisioned that the twenty percent match would be available from unspent taxi voucher receipts. These funds are reserved for refunds for residents who have moved or when vouchers are scheduled to expire. The funds have also been used over the years to help defray growing costs for the taxi voucher program as more residents use the service. However, the significant increase in use of non-emergency medical service, which is subsidized at the rate of almost 90%, has reduced these funds.

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If the City Council wishes to accept the Mobility Manager grant, it will need to use a different source of funding for the match. One alternative is to use funds from the unbudgeted General Fund reserve, which has a balance of approximately \$10 million. A second alternative would be to use the City Council Contingency reserve, which has a balance of \$50,000.

Fiscal Impact

If the City Council accepts the Mobility Manager grant with the requirement of a twenty percent match, the Council can fund the \$23,000 match for FY 09-10 from the City Council Contingency reserve or the unbudgeted General Fund reserve. It would leave a balance of \$27,000 if allocated from the Contingency reserve, or slightly less than \$10 million if allocated from the unbudgeted General Fund reserve.

Conclusion

The City Council approved an application for a federal grant for a Mobility Manager to assist residents and workers in the use of transit services, which requires a twenty percent match. Unspent taxi voucher funds that were to be used for the match have diminished due to significantly increased use of non-emergency medical transportation service. If the City Council wishes to accept the grant, it can match the federal funds with funds from the City Council Contingency reserve or the unbudgeted General Fund reserve.

EXHIBIT A
SCOPE OF WORK

TRANSMITTAL LETTER – PROJECT SUMMARY

A. Applicant/ Lead Agency Information:

Legal Agency Name: **City of Laguna Woods**

Address: **24264 El Toro Road**

City/State/Zip: **Laguna Woods, CA. 92637**

Contact Person: **Douglas C. Reilly, Assistant City Manager**

E-mail: **dreilly@lagunawoodscity.org**

Phone: **949-639-0561**

Fax: **949-639-0591**

B. Project Title:

City of Laguna Woods Mobility Management Project

C. General Description of Project Area To Be Served:

City of Laguna Woods and its residents; surrounding areas for low-income workers traveling into the City of Laguna Woods for work.

D. Project Type (check ALL that apply to THIS project, noting that Mobility Manager Projects must be submitted as their own, separate project proposals)

Capital Operating Mobility Management

E. Target Population Project Information (unique persons; count each individual only once and represent the number of individuals your program is likely to serve annually - in Year 1)

Number of JARC welfare recipients:	
Number of eligible JARC low-income persons: 33.25%	1,079 [local residents low-income] 200 [workers/ students traveling into the City]
Number of persons with disabilities: 66.75%	2,671 [with go-outside-home mobility limitations]
Number of other persons, not included above Description: residents seniors who are not low-income and are not disabled <i>Note: all population data based upon 2007 Dept. of Finance estimates.]</i>	11,875 [local residents 65+, non low-income]
	Total 18,426 city population (2007 CA. DoF)

Number of Trips/Services Provided:	Year 1		Year 2	
	n/a Mobility Manager			
Number of One-Way Passenger Trips				
Number of Trip Vouchers Distributed				
Number of Other Services (specify)				
Funding Request:				
Total JARC Grant Operations Request	\$		\$	
Total JARC Grant Capital Request	\$	30,590.00	\$	30,590.00
Total New Freedoms Operations Request:	\$		\$	
Total New Freedoms Capital Request:	\$	61,410.00	\$	61,410.00
Total Local Match for Project (funding that is not JARC, and not New Freedoms)	\$	23,000.00	\$	23,000.00
PROJECT TOTAL (must match pp. 20 & 21)	\$	115,000.00	\$	115,000.00

PART I: AGENCY PROFILE

Briefly describe your agency's purpose and services. Supporting documentation must be attached (e.g., agency brochure and any other explanatory information considered important by the applicant).

The City of Laguna Woods is a unique community of predominately seniors, making it a special environment for transit and transportation initiatives. The City's 2007 population estimate by the California Dept. of Finance, is 18,426, of whom 86 percent are age 65 and older (Exhibit 1). This is substantially above the countywide average of just under 10 percent age 65 and older. Predictably, the City has a very low, non-senior adult population of 13 percent of its total population, compared with the countywide average of 66 percent adults under age 65. Lower income seniors, at five percent of the City's senior population, are comparable to the countywide average of six percent overall.

Considerable differences emerge between City and County for the distribution of ages and the proportion of seniors reporting disabilities that impact their going-outside-the-home, a 2000 census attribute. Laguna Woods has about half the proportion of younger seniors, ages 65 to 74 than does the county – 27.9 percent Laguna Woods City versus 53 percent County. For the middle aged group of seniors, ages 75 to 84 the difference is somewhat less – 47.6 percent City versus 34.7 percent County. Importantly, for the oldest seniors, ages 85+, the City has double the countywide average – 24.5 percent City versus 12.1 percent County of seniors reporting disabilities that impact their ability to go-outside-the-home.

Exhibit 1

2000 Census Attribute, Summary File 3	Laguna Woods People by Category [1]	Laguna Woods People by Category [5]	% of Total Laguna Woods Population	Orange County	
	[2000 Census]	[2007 DOF Estimate]		[2007 DOF Estimate]	% of Total County Population
Total Population [1]	16,507	18,426	100.0%	3,098,121	100%
ADULTS 16-64 [2]	2,095	2,339	12.7%	2,041,055	65.9%
Low-income (ages 18-64) (Below poverty level as defined by the Census Bureau) [3]	144	161	0.9%	185,829	6.0%
<i>Percentage of Low-income for Adults (16-64)</i>	6.9%	6.9%		9.1%	
Disability (non-institutionalized) Ages 16-64 [4] with a "go outside home" disability	151	169	0.9%	144,945	4.7%
<i>Percentage of Adults 16-64 with a "go outside home" disability</i>	7.2%	7.2%		7.1%	
SENIORS [2]	14,268	15,927	86.4%	303,473	9.8%
Seniors, ages 65-74, with % of all seniors	3,983	4,446	27.9%	161,209	53.1%
Seniors, ages 75-84, with % of all seniors	6,785	7,574	47.6%	105,394	34.7%
Seniors, ages 85+, with % of all seniors	3,500	3,907	24.5%	36,870	12.1%
Low Income Seniors (Below poverty level as defined by the Census Bureau) [3]	822	918	5.0%	18,231	6.0%
<i>Percentage of Seniors 65+ below poverty level</i>	5.8%	5.8%		6.0%	
Disability (non-institutionalized) Ages 65+ with a "go outside home disability" [4]	2,393	2,671	14.5%	55,817	18.6%
<i>Percentage of Seniors 65+ with a "go outside home" disability</i>	16.8%	16.8%		18.4%	

[1] Census 2000 Summary File 3, Total Population.

[2] Extrapolated from Census 2000 Summary File 3, Sex by Age.

[3] Extrapolated from Census 2000 Summary File 3, Poverty Status in 1999 by age.

[4] Extrapolated from Census 2000 Summary File 3, Age by types of disability for the civilian non-institutionalized population 5 years & over with disabilities. Sub-Area data extrapolated from Census 2000 Geographic County Subdivisions.

[5] California Department of Finance Population Estimate 2008; subgroup estimates based upon percent of census 2000 populations

List your agency's existing transportation services (if applicable).

City Taxi Program

The City of Laguna Woods provides a Taxi voucher program, sponsored in part through OCTA's Senior Mobility Program. There are three types of taxi vouchers:

- (1) General travel
- (2) Special destination travel
- (3) Non-emergency medical travel.

In order to be eligible to purchase subsidized taxi vouchers, one must be a resident of the City of Laguna Woods and 60 years or older. Taxi service is available seven days a week and twenty-four hours a day; however vouchers must be purchased from the Laguna Woods City Hall during regular business hours.

Qualified residents may purchase a *general travel* book containing \$100 taxi bucks at a cost of \$40.00. These vouchers can be used anywhere in Orange County as long as the resident starts or ends in the City of Laguna Woods. The number of taxi bucks required for a trip depends upon the distance one travels outside a core area. The traveler will be advised on cost when the ride is booked. *Special destination* taxi vouchers are available for travel to the Irvine Transportation Center of Irvine Spectrum (\$4.00 each way) and John Wayne Airport, Fashion Island, South Coast Plaza, or Orange County Performing Arts Center (\$16.00 each way and limited to 8 voucher per July – June fiscal year).

The City's *non-emergency medical* voucher program provides deeply discounted transportation to medical appointments. The prices are as follows: Trips up to 15 miles for \$4.00, Trips up to 20 miles for \$6.00, Trips up to 25 miles for \$8.00, and Trips over 25 miles \$12.00.

List All Active Vehicles Year/Model	Passenger Capacity	Wheelchair Y/N	Current Mileage
No vehicles are owned by the City for passenger transport			

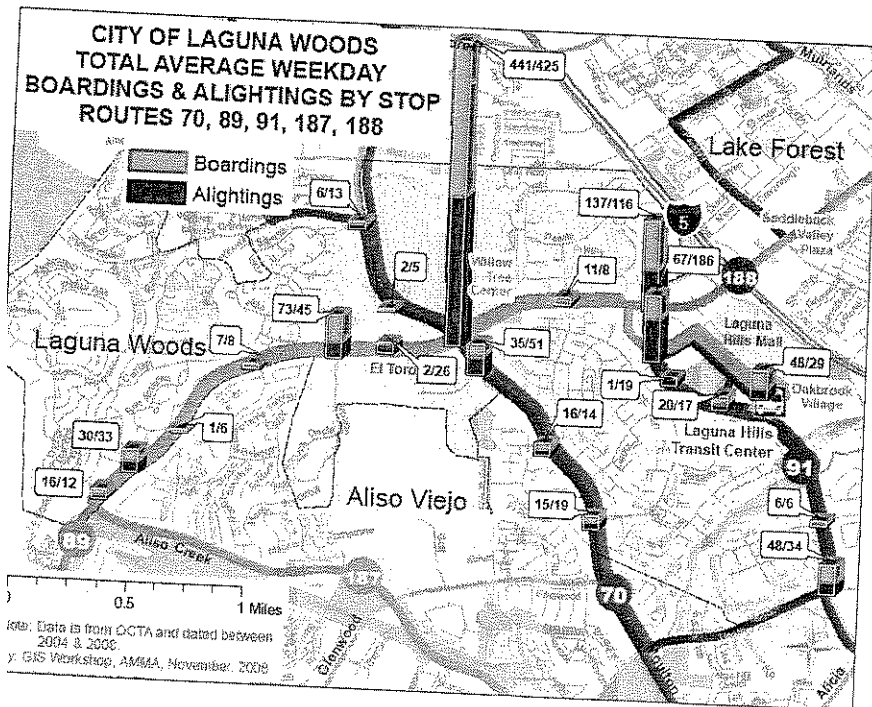
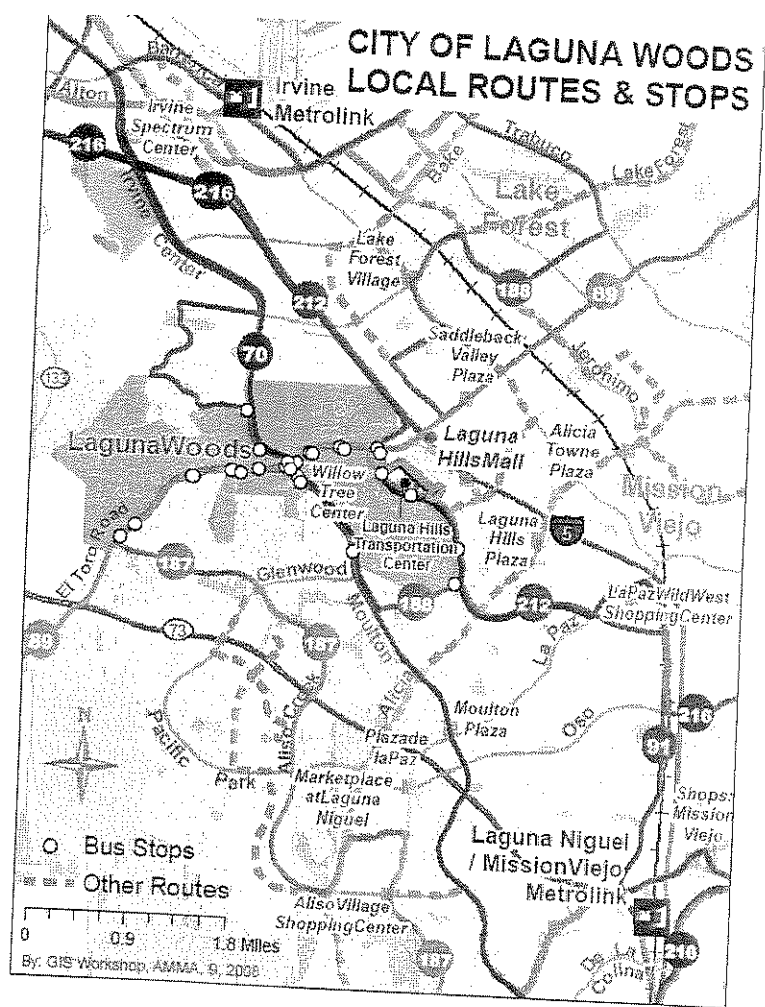
Additionally, within Laguna Woods is the Laguna Woods Village Bus service, a fixed-route operation that runs 1 routes through the Village and in the immediately surrounding City areas. It is complemented by the B-Bus which provides accessible service to Village residents requiring lift-equipped buses.

OCTA Services Within Laguna Woods

Of direct relevance to this project are the OCTA fixed-route services available to City residents. OCTA currently has seven routes operating in and around the City of Laguna Woods. These routes, because they are important to work-related trips of residents and non-residents are described briefly here:

Express Routes Two express routes (#212 and #216) operate weekday service only, providing limited peak hour service for regional trips. The #212 has two trips daily in each direction, serving Irvine, Laguna Hills, Mission Viejo, and San Juan Capistrano and stopping at the Laguna Hills Transit Center. The #216 provides one trip daily in each direction, traveling somewhat farther north and west to Costa Mesa from Laguna Hills, Mission Viejo and San Juan Capistrano and also stopping at the Laguna Hills Transit Center.

Peak Hour Service Two additional routes operate during peak hours only and serve more than the immediate environs, #187 serving cities to the south including Laguna Hills, Aliso Viejo, Laguna Niguel and Dana Point. Route 188 travels north and connects Laguna Woods to the Irvine Metrolink station, serving the cities of Irvine, Lake Forest and Laguna Hills. It does not provide mid-day service to the Irvine Metrolink station.



Local Service There are three local bus routes that serve a variety of destinations, operating throughout the day and seven-days-a-week.

- Route 70 operates with hourly frequency, traveling along Moulton through Laguna Woods and connecting it with cities to the north and west that include Huntington Beach, Westminster, Fountain Valley, Santa Ana and Irvine. Cities to the south served by Route 70 include Laguna Niguel and Dana Point.
- Route 89 travels east/west along El Toro Road and operates with 30

minute frequencies. Route 89 connects Laguna Woods with its neighboring cities including Laguna Hills and Lake Forest and to the south, Mission Viejo and Laguna Beach.

- Route 91 travels to South Orange County, providing 30 minute frequency service and connecting with Laguna Woods at the Laguna Hills Transit Center and generally serving destinations along the I-5 corridor, including the Irvine Metrolink station, Lake Forest, Laguna Hills, Laguna Niguel, Mission Viejo, San Juan Capistrano, Dana Point and San Clemente. Route 91 can be used to travel to the Laguna Niguel/ Mission Viejo Metrolink station or farther south to the San Clemente station to connect with the San Diego Coaster.

Laguna Woods' Residents' Current Use of OCTA Services

During OCTA's development of its coordination plan, adopted by the OCTA Board of Directors in October 2008 as the Public Transit-Human Services Transportation Coordination Plan for Orange County, information on Laguna Woods transit' utilization was developed, showing the relative use by City residents' of OCTA's fixed-route services and ACCESS services.

In both instances, **Laguna Woods is in the bottom quartile**, ranked 31st in the county in terms of utilization of fixed-route services on a trips per capita basis and ranked 32nd among OCTA cities in terms of utilization of ACCESS services. As examined earlier in this report, these levels of use are lower-than-expected, in large part because of the significant quantities of trips provided by the Laguna Woods Village transportation program.

It is specifically the OCTA fixed-route services that this project intends to target and to realize increased ridership through its efforts.

PART II: PROJECT SUMMARY

Briefly provide a project summary description. Include begin and end dates.

To tie your application to the Orange County Coordinated Plan, we suggest you read *Chapter 6, TRANSLATING NEEDS INTO PROJECTS – RECOMMENDATIONS*. For grant application requests, you can reference the relevant goal, objective and/or strategy from Chapter 6 to identify the plan element from which your project is derived.

This project builds directly upon recommendations developed to the City through the recent Laguna Woods-OCTA Go Local Study, Step 1. That study involved extensive community outreach, household surveying and other data collection activities and identified a number of opportunities. Chief among them was that despite considerable interest in public transportation, and already some significant use, a critical barrier to increased use of transit lay in the perceived effectiveness of the information and training tools upon which seniors relied. A further opportunity lies in the fact that seniors using transit are a model to others in Orange County, ambassadors who can grow awareness of and appreciation for the transit network that does exist in the County. This project hopes too, to develop and demonstrate exemplary mobility management practices.

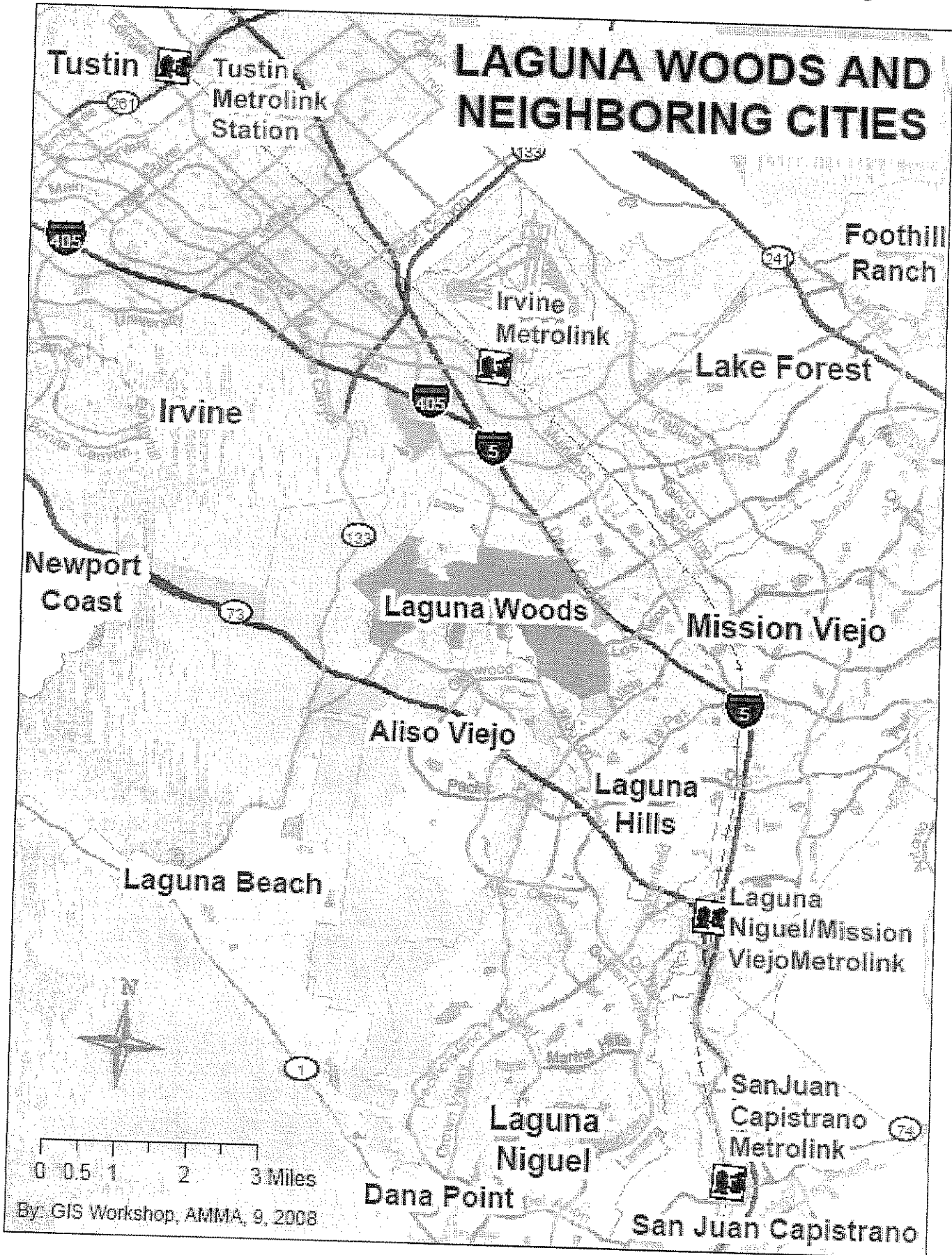
This Mobility Management project, planned for a two-year timeframe of June 2009 through July 2011, includes the following components:

1. A full-time Mobility Manager is proposed for Laguna Woods, to plan and undertake strategies to increase OCTA transit use by residents, largely fixed-route services, and to become a focal point for transit programs in the community.
2. This Mobility Manager will also help to grow use of transit by transit-dependent employees into Laguna Woods on behalf of employers in the City's small, but significant employment base which includes both commercial firms and the residents themselves.
3. Development of additional Trip Planner and way-finding information tools are planned to build a library of Laguna Woods-centric transit information to encourage new transit users and to expand the "transit possible" destinations for new and existing transit users.
4. Ongoing data collection, analysis and meaningful reporting of transit-related achievements of Laguna Woods is planned to contribute to service improvements – across modes – and to effectively represent Laguna Woods residents' transit use as a model for the general Orange County population, including youth and young adults.

This project is geared largely towards **Goal #1 – Enhanced Transportation Information & Communication** (p.66) of the Orange County Coordinated Plan. Its activities embrace those enumerated for **Project Area #5: Mobility Managers to Coordinated Information and Support Services** (pp. 74). Further detail regarding its activities and relationship to the plan follows in Part III of this grant application.

Briefly describe the current population and geographic area(s) that is served and the population and geographic area(s) that will be served by this project.
Supporting documentation and an 8-1/2 x 11 map of the service area must be attached.

Exhibit 2, Mobility Management Project Area, Laguna Woods and Surrounding Area



This project is targeted to **two populations**:

1. those seniors who are anticipating reducing their driving by virtue of increasing physical limitations that include impaired eyesight and/or other mobility limitations; and
2. low-income populations within Laguna Woods, both residents who are maintaining some level of regular work as a necessity to supplement their income and those individuals of low-income, including students, who may come to work in Laguna Woods.

Currently, Laguna Woods residents are transit users, to varying degrees. The City's recent Transportation Needs Assessment, conducted as part of OCTA's Go Local efforts, documents that almost six in ten households are using some form of public transit, most commonly the City's popular taxi voucher program. Nonetheless, only 10% of households, according to the current Go Local household survey, are fixed-route users. Three percent of householders use OCTA's ACCESS program, about on par with the county as a whole. The majority of residents use either the City's taxi voucher program or the Village bus service in and around Laguna Woods Village. Importantly, over one-third of surveyed households are uncertain as to whether they will still be driving within three years or do plan to stop driving within three years.

What is encouraging is that a significant number of residents, **45%, indicated interest in public transit** in the recent GO Local household survey. This may be use for the first time, to use it more frequently or to travel to farther or different destinations.

This project is designed to address **several types of transit trip needs**:

- First, in relation to New Freedom target groups, this project targets those senior residents of the City of Laguna Woods, including Laguna Woods Village, who are reducing driving or considering stopping driving – usually due to combined health issues, mobility limitations and a perceived slowing of reflexes and driving response times. These individuals are to be encouraged to consider the ways in which public transit can allow them to maintain their independence, even as their modes of transport shift away from driving alone. To consider such options and utilize them before they are needed will ease a senior's transition from driving to public transit user.
- Secondly, Job Access Reverse Commute target populations include low-income City of Laguna Woods residents. Significant numbers of seniors, on fixed-incomes, have been hard hit by the current economic crisis and are either facing reductions in their net worth or cannot realize the continuing returns on their retirement investments that they had planned on to last through their expected retirement years. Anecdotal evidence suggests that substantial numbers of seniors are now job hunting. As just one example, for a recent new job opportunity at the City of Laguna Woods, dozens of residents made application, far and above the number of applications received in the past for similarly classed positions.
- Thirdly, Job Access Reverse Commute target populations include those low-income residents of Orange County who can find work in Laguna Woods. The City has a modest employment base, with the largest employer being the Laguna Woods Professional Management Company with about 1,000 employees,

most of whom make well above a living wage. Two grocery stores, Vons and Stater Brothers, a Home Depot, a major restaurant chain and a residential health care facility all told employ another 550 persons, with many at low to moderate wage levels. The final significant employer is the residents themselves with 14% of households from the Go Local survey indicating that they employ someone to come into their home. Citywide, this survey finding translates to almost 1,800 households, suggesting another potential pool of transit users.

PART III: PROJECT NARRATIVE

Please provide a narrative to describe the project. Refer to the Project Scoring Criteria on pages 11 and 12 for additional guidance on each of the questions. To receive the maximum allowable points per question, each response will be reviewed and scored for clarity, completeness and accuracy.

A. Goals and Objectives (Maximum 20 points)

1. Briefly describe how your proposed project is consistent with the goals and objectives of either the JARC or New Freedom grants programs as listed on page four of this application.

This project is proposed for funding from both New Freedom and JARC. The New Freedom program funding (requested at two-thirds of total costs) is oriented to persons who are disabled and to transportation programs that go beyond the ADA. A target group of this Mobility Management effort will be to reach those seniors who are contemplating reducing driving or stopping driving, almost exclusively due to health conditions, and to introduce them to transportation alternatives in ways that will encourage early transit use. Attracting such riders to transit before they absolutely must use it can minimize reliance upon OCTA's ACCESS ADA complementary paratransit services as these seniors develop a comfort level with mainline, fixed route transportation services.

Project funding from the JARC program (requested at one-third of total costs) is proposed on behalf of two working populations that this project also targets:

- Laguna Woods residents who are working or are seeking work related to their income status and concerns about the continuing sufficiency of their income; and
- transit dependent low-income workers and students who can find work in Laguna Woods and be aided by public transportation in obtaining that.

2. Specify how your project addresses the gap(s) and/or barrier(s) identified through the Coordinated Plan. *(Indicate the section/page number in the Coordinated Plan, possibly from Chapters 2, 5 or 6).*

Information needs, discussed on page 49 of the Coordinated Plan, speak to the need for enhanced, better coordinated and more pro-active information programs, such need emerging from both the Plan's outreach efforts and the stakeholder survey. The Plan notes that the need for centralized information was the second-ranked opportunity desired by the stakeholder survey, with comments that existing information resources within OCTA and the Office on Aging are either not sufficiently marketed or don't

provide quite the right type of information in the moment at which seniors, and others, require it. The L.W. Mobility Manager would come to be seen as the “go-to” person for public transportation information for residents of the City. Similarly, other stakeholders, such as the Irvine One-Stop Center will have a new, supportive resource to assist them with mobility issues of their consumer base, related to employment in Laguna Woods.

Existing information tools are not sufficient to meet the needs of older travelers or new transit users or prospective transit users. An important dimension of this project is the development of additional destination-oriented tools that assist transit users and prospective transit users in numerous ways. A sample Trip Planner, Laguna Woods-to-Los Angeles Music Center, is included as one example. This Trip Planner includes various way-finding maps and user friendly information designed to answer all of the riders possible questions about the trip, in advance of taking the trip. It also serves as a guide on the trip. This Mobility Management project will see the development of additional such trip planner guides, to additional destinations.

Gatekeeper training (also p. 49) suggest the value of bringing training to the front lines staff persons, in this case the representative Mobility Manager at City Hall, who can describe to the inquiring senior just where and how to make a potential transit trip. The L.W. Mobility Manager would be required to learn and to use public transit, to be able to readily guide the uncertain newcomer or assist a veteran traveler with a particular piece of information.

Information updates (p. 50) speaks to the importance of having institutional knowledge about key service changes and “locating” such information in a person or place where a particular targeted audience could rely upon finding it. The value of regular service updates and printed or electronic newsletters was noted (p. 50). The L.W. Mobility Manager would develop such communication tools to advise residents of newest information and to put a regular “face” on public transit resources and public transit information.

Trip planning and arranging assistance (p. 51) was a key additional tool that makes the difference for some prospective users. If they can call someone who will walk them through the trip they intend to make, and assist with setting it up for the most frail, this helps them better navigate public transit. Conceivably, the L.W. Mobility Manager could have routine in-the-office hours to assist city residents with transit trip planning and to aid them in making transit arrangements. If such in-the-office-hours are published and generally known, she could provide a regular resource for such hands-on assistance, undertaking other kinds of off-site mobility manager duties at different times.

Mobility training and buddy travel (p. 51) opportunities are called out in the Coordinated Plan as another important tool for encouraging uncertain users to try transit. Planning for, undertaking and coordinating such travel training opportunities and linking buddy travelers with one another are key to helping non-transit users consider it as a viable transportation option. The L.W. Mobility Manager could be the focal point for such training activities and for linking volunteer buddy travelers with those interested in trying transit but not wishing to do so alone.

Input to service planning decisions (p. 50) is called out in the Coordinated Plan as a mechanism for providing input to the service planning choices of potentially OCTA fixed-route and Access services, as well as to the City's taxi voucher program and other transportation services. The L.W. Mobility Management activities will include data collection activities and analysis of these data so as to be able to provide input at key points, to key decision-makers.

Mobility Manager at regional, agency or program levels (p. 54) suggests the levels at which the mobility management function may be placed, recognizing that comprehending transit services and communicating that understanding appropriately is a role that is played out variously at a number of organizational levels. The L.W. Mobility Management project conceived of here attempts to embrace all three levels:

1. envisioning direct consumer interaction through hands-on transportation information and training,
2. agency level responses that provide newsletter and e-letter information to larger numbers of persons, and
3. regional or systems level input through data collection and analysis about trends, utilization and undermet needs.

B. Coordination Activities (Maximum 20 points)

1. Discuss how your program will coordinate with others to expand scarce resources, provide more trips, and/or better meet consumers' needs.

Coordination activities anticipate work with a number of partners in and around Laguna Woods. The City's principal partners include the Florence Sylvester Senior Center, South County Senior Services, and representatives of the Laguna Woods Village, through its recreational services department, the Presidents' Club (which includes the presidents of almost 100 clubs and service groups within the Village) and the City's major employers.

Additionally, the Mobility Manager plans to develop working relationships with the Orange County One-Stop Center in Irvine, related to low-income workers who may travel to Laguna Woods for work purposes. Further there are various educational institutions in the region, Saddleback Community College and ROP programs in Lake Forest and Laguna Beach, who work with transit dependent individuals who may seek work in Laguna Woods and who will benefit from improved information about transit access to the City.

Through formalized and informal means, the following kinds of coordinated activities are anticipated:

- Working directly with the senior center in relation to its driver training program where it works with seniors who are at risk of losing their drivers' licenses or are anticipating difficulties with upcoming driving tests. The L.W. Mobility Manager will work closely with this program, through outreach to participants and through modified program design, to bring in more directly the public transit alternatives available to these individuals.
- Working with the Laguna Woods Village recreational services department, and its regular meetings of the Presidents' Club, the L.W. Mobility Manager will identify herself as the transit

“go to” person, bringing to that group various programming initiatives that could involve solicitation of volunteer travel buddies, participants for a planned “transit outing” to a desired recreational destination, new transit information such as the anticipated seniors’ fare increase and other system-wide changes or more localized routing or service scheduling changes.

- Working with the city’s significant employers will involve a number of strategies that may include developing handouts for distribution about the transit services available, the particular times of specific routes and location of nearby bus stops. Destination-specific flyers could be graphically attractive and informative about the routes INTO (and away from) Laguna Woods and could assist employers in advising their employees about public transit options. These flyers could also be distributed to residents, themselves employers, to assist them in advising their household help of public transit alternatives.
- Partnering to reach the Laguna Woods commuter will involve targeting selective networks or Clubs within the Village community most likely to reach the low-income residents and those residents who are contemplating going back to work. Some potential new clubs, such as “polishing your resume” or “job hunting for seniors” are envisioned of which transit information and participation by the L.W. Mobility Manager could be a central feature.
- The Irvine One-Stop Center will be contacted to explore travel information needs for low-income individuals who might find work in Laguna Woods.
- Area educational institutions, including , extension programs at U.C. Irvine and at Saddleback Community College, UCI- Women’s Opportunities Center-Career and ROP programs in Lake Forest and Irvine will be contacted to explore potential coordination opportunities – for transit dependent students looking for work and possible intergenerational opportunities where seniors using public transit may be models for younger travelers.

Significant effort will be made by the L.W. Mobility Manager to develop and secure these working relationships, growing the fabric of coordination around transportation services for Laguna Woods.

C. Operational/Implementation Plan (Maximum 25 points)

1. For Operating projects, describe your operational plan that includes defined routes, schedules, current/projected ridership, key personnel, and marketing strategies; and/or for Capital and Mobility Management projects, describe your implementation plan that includes project tasks, timeframes, benchmarks, key milestones, key personnel, deliverables and estimated completion date. Attach supporting documentation to substantiate your plan(s).

Attached to this proposal are the following supportive materials:

Appendix A, City of Laguna Woods Newsletter with supporting transportation information

Appendix B, Laguna Woods Go Local Report, January 2009 Summary, reflecting selected mobility issues of the Laguna Woods residents

Appendix C, Laguna Woods Go Local Report, Appendix C – Household Survey, documenting existing public transit use patterns

Appendix D, Consultant support qualifications – Transit Marketing LLC, Selena Barlow and A-M-M-A Transit Planning, Heather Menninger

Appendix E, **Letters of Support** [being submitted under separate cover]

Loose attachment -- Laguna Woods/ Union Station Trip Planner template, an example of detailed Trip Planner information.

The following sub-section describes key activity areas of the Laguna Woods Mobility Management project. The project, as envisioned, anticipates the hiring of one or two Laguna Woods residents as the **L.W. Mobility Manager**. It is conceivable that this could involve hiring two persons in half-time positions as many Laguna Woods residents prefer to work part-time.

Additionally, some modest levels of consultant support to this position are budgeted, to strengthen and extend the Mobility Manager position. Marketing and graphics consultation will come from **Transit Marketing, LLC** and transportation planning assistance from **A-M-M-A Transit Planning** are planned. Summaries of their qualifications are included as Appendix D. The marketing efforts will be largely focused on building the trip planner/ destination library of which a sample is included as a loose attachment. The planning support is anticipated around the reporting and evaluation activities, detailed further in Section D following this section.

Year 1 Mobility Management Project Activities

Year 1 -- Quarter 1

- Develop job description of mobility manager, advertise and hire position.
- Develop list of potential partner agencies and organizations, both local organizations and contacts, regional offices and, where appropriate, county agency headquarter offices.
- Outreach to partner agencies and other organizations and agencies that access providing transportation services to older adults and other residents
- Meet with staff of at least 3 partner agencies to identify transportation issues, needs and strategies, as well as possible methods of outreach to individual targeted consumers.
- Begin developing database of organizations, agencies, employers and contacts, to include prospective partnering agencies.
- Develop initial data gathering tool to track Mobility Manager activities, outcomes, and planned events.
- Ride local bus routes to familiarize with local services, limitations and opportunities.

Year 1 - Quarter 2

- Meet with staff persons from an additional 5 agencies and/or local employers to identify issues.
- Meet with consumer focus groups, some consisting of targeted low income individuals, some frail seniors and some able-bodied seniors, possibly including caregivers, relatives to explore transportation and communication needs.
- Begin designing training modules, identifying existing training resources and building others focused to needs of Laguna Woods residents.
- Begin to identify informational tools of value to workers coming into the City and methods of getting these into the hands of those requiring them, potentially through local employers.
- Build and expand upon list of key destinations of interest to Laguna Woods residents.
- Expand database of prospective agency partners, local contacts and prospective volunteers.

Develop list of transportation-related services, funded and non-funded, which each potential partner can contribute to emerging transportation partnerships.

Refine data gathering tools, to include development of pre and post training evaluations, and methods of capturing experiences of coordination partners in informing transit dependent individuals seeking employment of Laguna Woods opportunities.

Develop quarterly reporting format, designed for value to various stakeholders.

Ride local bus routes to familiarize with local services, limitations and opportunities.

Year 1 - Quarter 3

Meet with staff persons from an additional 5 agencies and/or local employers to identify issues.

Prepare training pilots and conduct initial sessions, obtaining feedback on value to consumers and agency/ organization representatives.

Refine information tools, with assistance from graphics consultant.

Continue building local destinations listings and work with graphics consultant to determine destination information to add to the Trip Planner library.

Set schedule for on-site, information hours for trip planning and trip arranging assistance to residents.

Begin design of services and service programs to address identified consumer needs.

Work with planner consultant to establish key record-keeping abilities to allow for tracking utilization by consumers.

Ride local bus routes to familiarize with local services, limitations and opportunities.

Refine tools for data collection, evaluation and reporting on outcomes.

Year 1 - Quarter 4

Continue the conduct of and refinement of responsive training and other Mobility Manager services.

Develop transportation coordination agreements with 2 to 4 partner agencies – potentially around training, around information services or other services or programs targeted to needs.

Participate in selective regional activities, such as OCTA Special Needs Committee or other group(s) oriented to issues of concern to the Mobility Manager position.

Prepare a L.W. Mobility Manager newsletter and other communications designed for various audiences which may include residents, local employers and agency representatives and consumers.

Plan for semi-annual distribution of newsletter through balance of two-year project timeframe. Create e-version newsletter element with simple updates that can be readily posted on the City's website.

Ride local bus routes to familiarize with local services, limitations and opportunities.

Prepare first year report of initiatives and outcomes, designed for various stakeholder audiences.

Year 2 Mobility Management Project Activities

The emphasis of the second year is likely to address the following key areas:

1. solidifying the service design and development of training modules/ training tools other service elements responsive to identified travel needs of Laguna Woods residents, commuting residents, workers coming into Laguna Woods, agency representatives and local employers;
2. exploring additional service elements such as a volunteer travel buddy program, volunteer mileage reimbursement program and others;
3. refining and building additional coordinated agreements among stakeholders, both formal and informal;
4. implementing trip planning, trip arranging, trip scheduling functions to assist residents in using local and regional public transit resources, while still promoting their independent use of these resources;
5. identifying further partners, both locally and regionally, among human service agencies, employers and low-income worker employment groups to build the partner base; including semi-annual publication of the newsletter, with attention to developing a funding base for future Mobility Manager activities.

Any funded third and fourth year activities would entail evaluation of the successes of the initial years, identifying program strengths and weaknesses, consideration of best use of available resources and appropriate re-framing of the project towards that analysis. This evaluation process is likely to involve the key project participants, including the City of Laguna Woods and OCTA contract officers.

D. Program Management Activities (25 points maximum)

1. Identify the performance measures and indicators to track the effectiveness of your proposed project and include the number of persons you anticipate to be served and the number and purpose of trips (and other measurable units of service) the project will provide. Include the desired outcome (impact) that the project will have on low-income individuals (JARC) or individuals with disabilities (New Freedoms). (See page six for performance measures.)

This Mobility Management project will involve a consultant planner to assist with specific identification of measures of the impact of Mobility Manager activities. As this project does not directly provide trips to persons, the Mobility Manager performance measures will identify and track two classes of information:

1. **process measures** relating to counting various units of service or contacts or training programs or tools developed, produced, provided; and
2. **outcome measures** that attempt to assess the impact of program activities on the target populations.

Process measures are likely to include, but not be limited to:

- Number of potential partner agencies identified and with whom meetings are conducted.
- Number of partner agencies with whom informal cooperative arrangements develop.
- Number of partner agencies with whom formal cooperative agreements are executed.
- Number of newsletters and e-notification tools produced (plan for semi-annual newsletters; more frequent e-notices likely).
- Number of training programs designed; number of training sessions conducted.
- Number of persons/ agencies in contacts database.
- Type and characteristics of new services designed
- Characteristics of funding base identified

Process indicators are likely to include:

- Development of partnering relationships with an annual minimum of 10 agencies or employers.
- Defined coordination arrangements with partnering agencies, both formalized and informal.
- Between three and four newsletters during the two-year term; a minimum of 6 to 10 transportation e-notice alerts to contacts database.
- Between six and ten destination trip planner tools (depending upon their complexity) to add to the Trip Planner Library, including selective way-finding maps, for posting on the City's website.
- Training events of modest and less-modest scale: weekly after 2nd quarter of first year and thereafter.
- Trip planning assistance: weekly contacts after 2nd quarter of first year and thereafter.

Outcome measures are likely to include but not limited to:

- Evaluation by consumers of training sessions offered
- Evaluation by sampled consumers of selective other services offered (on-site information assistance; volunteer travel buddy program and other initiatives)
- Pre and post measures on trainees' use of public transit
- Collecting OCTA boarding information by mode (fixed-route & Access) to compare to prior period
- Possible household survey or other sampling method to assess householder public transit utilization
- New funding secured.

Outcome indicators are likely to include:

- Increasing proportions of consumers providing favorable ratings of training programs, reflecting modifications to training curriculum over time.
- Counts (from interact access to the City's Trip Planner library) of residents' contacting and potentially using the Trip Planner tools; feedback form inviting them both to write about their experiences in using the Trip Planner tool and to offer suggestions on its improvement.
- Documented impacts for consumers of Mobility Manager activities (travel training/ trip planning/ buddy trips/ destination-oriented trip planner information)
- Measurable change in numbers of boardings of fixed route, possibly at selective stops; measurable increase in the proportion of overall Laguna Woods residents using public transit; measurable increase in the proportion of newcomers to Laguna Woods using or introduced to public transit.
- Amount of new funding secured.

Additionally, the project will seek to identify the content and appropriate mechanisms for regular input to the system of transportation services, including OCTA's fixed route and ACCESS programs, the City's taxi voucher program, the Village bus service and other specialized transportation programs such as South County Senior services. This could include anecdotal information about bus stops, transfer locations or connections between service. It could involve agency or resident experiences of the scheduling of existing services and comments to appropriate OCTA planners regarding those. Or it could involve other, as yet unknown, comments about services and service delivery. Quarterly reports, prepared in part by the consultant planner in conjunction with the L.W. Mobility Manager, will serve to summarize these and related issues and provide an ongoing narrative about the City's Mobility Management project.

2. Based upon the performance objectives and outcomes identified in Question 4 above, describe your methodologies and procedures for ongoing monitoring and evaluation of the project or service.

- An activity log will serve to document the activities of the Mobility Manager, including contacts, meetings, training sessions, regional workshops and meetings and other activities.
- The contacts database, built in ACCESS or in Excel depending upon the computer skills of the Mobility Manager, will be a mechanism by which to collect and document contacts developed through the project.
- A training calendar and the on-site trip planning/ trip information schedule will be maintained.
- Training pre and post tests will be developed, modified to reflect the different types of training that may be undertaken.
- Contacts with the program will be counted, through internet counts of selected items on the City's website, though counts of use of various Mobility Manager services (e.g. trip planning assistance and training sessions).
- Transit mode utilization information will be collected at least annually, to compare with the baseline mode utilization documented in the City/OCTA Go Local study report. It may also be possible to conduct a modified household survey to assess use rates by residents from a randomized sample of households.

3. List all stakeholders involved in the project at its outset. Identify potential future partners and methods of obtaining their participation in the project. List may include, but not be limited to, Health and Human Services Agencies, public/private sector, non-profit agencies, transportation providers, and members of the public representing low-income (JARC) and individuals with disabilities (New Freedom) and from public transit agencies. Attach letters of support from stakeholders appropriate to this grant application.

Stakeholder letters of support are being procured but due to some miscommunication were not fully collected in time to submit with this application. These will be provided, as a single package labeled Exhibit e, to Ms. Dana Weimiller during the first week of March. Stakeholder agencies with whom the LW Mobility Manager project expects to work, and with whom coordination partnerships will be actively pursued, include:

- Laguna Woods Village community services department
- Laguna Woods Village transportation department
- Laguna Woods Clubs (there are over 100 clubs)
- South County Senior Services
- Florence Sylvester Senior Center
- Local employers, including Stater Brothers, Vons, Longs, the professional management company associated with Laguna Woods Village, the Olive Garden and others
- Orange County One Stop Center at Irvine
- Educational institutions that include the ROP programs in Lake Forest & Laguna Beach
- UCI Extension Career Life Planning Programs

4. Describe how you will promote public awareness of the project and how you will keep stakeholders involved and informed throughout the project.

Public awareness will be a central part of this effort, promoted through newsletters, e-notices, community meetings, presentations as Village clubhouse events, articles in local newspaper/ newsletters/ local t.v. programs and so forth. It will be the responsible of the Mobility Manager to identify as many avenues of public promotion as possible.

5. Discuss strategies for continuing this program beyond the two-year funding cycle if that is a desired program goal.

The documented value of the programming activities described through this application will help to determine the extent to which its specific programming can be continued. Some continuation effort could conceivably be funded through the taxi voucher program receipts. It may be that there are special grants, alternative grant funding, to be obtained related to training seniors and addressing the mobility needs of a growing aged population. Seeking out new and special grant opportunities will be a responsibility shared among the project's three key players: the L.W. Mobility Manager, the consultant transit marketing and graphics specialist and the consultant transit planner.

PART IV. PROPOSED BUDGET

The budget to be submitted is for the project being proposed for funding through this application, not the entire budget for your agency or organization. The following forms are attached and must be completed and submitted with your application:

1. Proposed Project Budget
2. Proposed Project Funding
3. Detail of Required Match Funding

These forms are available in Microsoft Excel upon request. Applicants are requested to provide additional detail where appropriate to facilitate the understanding and review of your application. The evaluation process allocates a maximum 10 points to the budget review.

Local Match:

The local share may be derived from other federal programs that are eligible to be expended for transportation, other than DOT programs, or from DOT's Federal Lands Highway Program. Examples of types of programs that are potential sources of local match include: employment, training, aging, medical, community services, and rehabilitation services. Specific program information for other types of Federal funding is available at www.unitedweride.gov

PROPOSED BUDGET		
Expense Detail	Proposed Budget	
	Year 1	Year 2
EXPENSES		
Position % Time		
Salaries by Position (include benefits):		
A. Mobility Manager	\$ 70,000.00	\$ 70,000.00
B. Drivers	-	-
C. Dispatch/Scheduler	-	-
D. Trainer	-	-
E. Trip Coordinator	-	-
F. Administrative Assistant	-	-
G. Executive Director	-	-
H. Other _____	-	-
Other _____	-	-
Total Salaries & Benefits	\$ 70,000.00	\$ 70,000.00
Non-Personnel Expenses:		
Advertising	-	-
Fuel/Oil	-	-
General Office Expense	-	-
Radio Communications	-	-
Rent	-	-
Repairs & Maintenance	-	-
Printing	-	-
Telephone	10,000.00	10,000.00
Training/Staff Development	-	-
Travel & Meeting Expenses	5,000.00	5,000.00
Uniforms	-	-
Vehicle Insurance	-	-
Vehicle Maintenance	-	-
Other- Licenses & Associations	-	-
Planning and Analysis	10,000.00	10,000.00
Graphic Support	20,000.00	20,000.00
Total Non-Personnel Expenses	\$ 45,000.00	\$ 45,000.00
Capital Expenses:		
Vehicle Purchases	-	-
Other:	-	-
Total Capital Expenses	\$ -	\$ -
Administrative Overhead	\$ -	\$ -
TOTAL PROJECT EXPENSES	\$ 115,000.00	\$ 115,000.00

Agency Name: City of Laguna Woods
 Project Title: Mobility Management Program

TOTAL PROJECT EXPENSES [From Proposed Budget Form]	\$ 115,000.00	\$ 115,000.00
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PROPOSED PROJECT FUNDING

Line #	Proposed Fund Source	Proposed Budget	
		Year 1	Year 2
1	Section 5316 JARC -- Operating		
2	Required Match @ 50% (minimum)	\$ -	\$ -
3	Section 5316 JARC -- Capital		
4	Required Match @ 20% (minimum)	\$ 30,590.00	\$ 30,590.00
5	Section 5317 New Freedom -- Operating		
6	Required Match @ 50% (minimum)	\$ 7,647.50	\$ 7,647.50
7	Section 5317 New Freedom -- Capital		
8	Required Match @ 20% (minimum)	\$ 61,410.00	\$ 61,410.00
	Other Proposed Funding Not Proposed as Match:		
9	1.	\$ -	\$ -
10	2.	\$ -	\$ -
11	3.	\$ -	\$ -
12	4.	\$ -	\$ -
13	5.	\$ -	\$ -
Total Proposed Project Funding [Total must equal Total Project Expenses at top.]		\$ 115,000.00	\$ 115,000.00
Total Match Required [Total of lines 2+4+6+8 above]		\$ 23,000.00	\$ 23,000.00