

To: Board of Directors

Date: October 30, 2014

From: Laramie Bowron, Manager of Planning

Reviewed by:

SUBJECT: Mobility Manager Contract

Summary of Issues:

Staff is recommending that County Connection enter a contract with Senior Helpline Services to grow mobility management in Contra Costa County by developing projects, programs, and functions described in the Mobility Management Plan. This pilot project will be funded through County Connection's New Freedom Cycle 5 grant and the Contra Costa Transportation Authority's (CCTA's) New Freedom Cycle 3 grant; for a total of \$245,000.

Background:

When the mobility management project was originally developed it had three phases: an inventory of services, a mobility management plan, and a web database making the inventory accessible. The Contra Costa Mobility Management Plan, adopted by County Connection Board of Directors on October 10, 2013, represented the first two phases of the project. CCTA was awarded New Freedom Cycle 3 funds complete the third phase.

After County Connection adopted the plan, it was presented to CCTA's Board who was unwilling to adopt it without consensus from the four Regional Transportation Planning Committees (RTPCs). CCTA and the RTPCs supported mobility management and its functions but conflict arose from West County over where the mobility management center would be located and how their needs would be addressed.

When progress stalled at CCTA, County Connection again took the lead to build on the support for mobility management. In 2014 County Connection applied for and was awarded a \$125,000 New Freedom Cycle 5 grant to retain the services of a mobility manager to develop programs and projects included in the plan.

Current Steps:

Throughout the outreach and stakeholder work involved in developing the mobility management plan, Elaine Welch, the Executive Director of Senior Helpline Services emerged as a passionate, knowledgeable, and enthusiastic champion of mobility management. Senior Helpline Services already operates several programs addressed in the mobility management plan, including volunteer driver and information referral programs in Contra Costa County. She is currently involved in coordinating grant applications for non-profits in the county that work with senior and disabled populations.

After receiving the New Freedom Cycle 5 grant, Elaine submitted a proposal to develop and coordinate the mobility management functions in Contra Costa County. This includes: growing the information referral service, coordinating and standardizing travel training, developing a

coordinated maintenance and repair program, and expanding volunteer driver programs. This work will serve as a pilot project to prove the viability of mobility management which is needed to secure a long term funding source.

At their October 2014 meeting, CCTA authorized the transfer of their \$120,000 New Freedom Cycle 3 grant to County Connection to be combined with our Cycle 5 grant. Combining the funds simplifies administration and allows for a greater impact. A requirement of the transfer is that the original scope of their grant to complete web database is completed.

Elaine Welch has support from MTC, CCTA, and County Connection staff and is a natural choice to take on this work.

Recommendation:

The committee recommends the Board authorize the General Manager to enter into an agreement with Senior Helpline Services for an amount not to exceed \$245,000 to complete the remaining mobility management tasks outlined in the New Freedom grants.

Attachments:

- 1) Senior Helpline Services Proposal

Contra Costa County Mobility Management Center

About Senior Helpline Services

Senior Helpline Services, a 501(c) (3) nonprofit, charitable organization, enables seniors, age 60 to over 100, to age in place safely and comfortably by providing transportation services, telephone relationships, information and referrals; and offers opportunities for seniors and others who care about aging issues to become agents of change for our communities. The programs currently offered by Senior Helpline Services are Reassurance Phone Friends and Rides for Seniors.

In June 1998, Contact Care Helpline added the Reassurance Phone Friends program to the call-in Helpline services it had offered residents in Contra Costa County since 1972. The Reassurance Phone Friends program matches a lonely, socially isolated senior with a trained volunteer caller who will keep the promise to call daily or less frequently, as requested, to provide emotional support, friendship, and active listening to identify problems that could be referred to staff for follow up and assistance. In this program, staff members also provide a “safety net” by following up on unanswered calls to see if the client needs immediate help due to illness, injury, or other reason. Annually, volunteer phone friends make thousands of calls.

In 2003, recognizing the unmet needs of seniors residing in our community, the organization decided to transfer the function of the call-in Helpline to the Contra Costa Crisis Center and become an all senior services agency. The Reassurance Phone Friends program became the sole program offered by the agency. In 2004, the agency name was officially changed to Senior Helpline Services to better reflect our new focus.

In 2005, Senior Helpline Services began offering to our ambulatory, otherwise home-bound, senior residents of Contra Costa County free one-on-one, door-through-door rides provided by screened and trained volunteer drivers. In 2012, this program was expanded to Northern Alameda County. These rides are primarily for the purpose of obtaining medical care, groceries, and other basic necessities. Rides for Seniors is a unique, award winning transportation model with safeguards not provided by other senior mobility programs. In 2012, volunteer drivers drove over 46,000 miles providing nearly 4,000 rides. Home visits made to potential clients for our Rides program have revealed unsafe living conditions in varying degrees. It is, of course, not our intent to foster unsafe living situations by providing the services of our programs that help seniors age in place. We have always tried to help clients improve home safety and reduce fall risk, and have come to realize that we could do a much better job of this with written educational materials and safety items and equipment. As a result, we now distribute home safety/falls prevention information to our clients; conduct formal home safety evaluations; have added more education on prevention of falls and improving observation and reporting skills of volunteers and staff; and maintain an inventory of home safety and falls prevention items and equipment for distribution/installation by staff during home visits.

Senior Helpline Services staff members have always given information and referrals to callers looking for mobility assistance, but we formalized this service and now offer it on a larger scale. In January 2012, Senior Helpline Services opened two new numbers, one of them toll free, for seniors and those trying to help them find the right transportation provider to maintain their mobility outside their home.

Our overall goal is to see that the programs and services we offer contribute to our clients’ primary goal, which is to age in their own homes with the support they need. We are significantly increasing our clients’ opportunities for healthy aging by providing our services to them, especially escorted rides to obtain the clinical care they need, as well as the basic necessities of life. As a result, our clients experience improved health status through access to preventative health care, medical, mental health, and

dental appointments, surgery, prescribed medications, and proper nutrition and exercise. Emergency rooms are no longer their initial primary care provider. They are also able to avoid being forced to reside in nursing homes, sharing their bedroom and bathroom with a stranger at the cost of over \$70,000 a year, simply because they became home-bound due to lack of transportation and other basic support services.

Project Approach

Senior Helpline Services is proposing to serve as the Mobility Manager for Contra Costa County and to build upon the Contra Costa County Mobility Management Plan adopted by County Connection in October 2013 by implementing its recommendations. This includes the formation of a Mobility Management Advisory Committee and developing specific mobility management functions identified in the plan.

As stated in the Mobility Management Plan, the Advisory Committee and mobility manager will also be responsible for guiding the discussion of critical details mobility management and performance standards. The Advisory Committee is proposed to include: executive staff from Contra Costa County transit operators, the Contra Costa Transportation Authority, and human-service agencies. This committee will also serve as the primary advisory body which will help ensure that coordination and communication continues throughout the project.

In this growth stage, considerable time and effort will be necessary to forge partnerships with other organizations and implement service functions.

Successful implementation of the Mobility Management for Contra Costa County requires a series of actions crafted to maintain the consensus that has emerged around the overall concepts contained in the Plan. Success will be evident in the level of community and agency support for the approach and the efficiency of the resulting structure.

The long-term goals of mobility management in Contra Costa County are to:

- Increase transportation options for seniors, the disabled, and persons of low income.
- Identify and implement efficiencies in community transportation operations.
- Reduce the costs for public transportation.

The Contra Costa Mobility Management Plan, through the outreach process, identified the challenges, barriers, and gaps that the senior and disabled populations face when traveling throughout the County. Additionally, an overarching theme was the lack of coordination which will be central to Senior Helpline Services' work.

The following functions represent the core of the proposed work plan and the most viable identified in the Mobility Management Plan:

- Travel Training,
- Coordinated Vehicle Maintenance,
- Transportation Information and Referral,
- Advocacy Role of Mobility Management,
- Grant Writing

Detailed Work Plan

Task 1: Project Management

1.1 - Kickoff Meeting

Specific tasks to be part of the kickoff meeting include:

- Finalize the project timeline and scope of work
- Determine the membership, deliverables, and meeting regularity of the Advisory Committee. The Advisory Committee will be responsible for setting the performance measures that will gauge the success of the project.

1.2 Ongoing Project Management

Senior Helpline Services will submit quarterly reports to County Connection showing progress on mobility management activities from the Contra Costa County Mobility Management Plan. Reports will include a summary of all work completed during the quarter, in-progress and upcoming tasks/next steps, invoices, and remaining budget.

Deliverables: Kickoff Meeting Agenda and Notes
Revised Scope and Schedule (if necessary)
Advisory Committee Members and Meeting Schedule

Task 2: Inventory

The purpose of the inventory is to collect as much data as possible about what mobility options exist for seniors and people with disabilities in Contra Costa County.

The inventory will include contact information for each provider, eligibility requirements, areas served, clients served, cost, trip reservation requirements, accessibility, and description of the service, plus other information deemed relevant. The inventory will be provided in the following formats: database, website, and hard copy publication in English and Spanish. These will be kept up to date on a timely and regular basis.

Deliverables: Inventory Participant List
Raw Input Data
Draft and Final Copies of the Inventory

Task 3: Travel Training

Travel Training involves matching riders with the service best suited for them and training them to use it independently. This usually means moving people from the ADA service to fixed-route transit, which can produce savings for transit agencies, but can also be a resource for individuals prior to seeking ADA certification.

Riders that transition from an ADA service to fixed-route transit have increased mobility and independence. This transition allows a rider to travel without the need to schedule a ride as required when using paratransit services. Travel training is an example of a mobility management strategy that enhances existing public transit by moving riders from paratransit service to the less expensive option of fixed-route.

Senior Helpline Services will gather agencies that currently provide travel training as well as those interested in providing travel training for their participants to develop a travel training curriculum and materials that address the specific needs of varying groups focusing on seniors and disabled adults. This would be followed by the actual design and development of specialized travel training programs for individuals and groups. Train the trainer workshops would be followed by actual trainings.

Deliverables: List of Travel Training Programs
Proposed Curriculum
Meeting Notes

Task 4: Transportation Information and Referral

Transportation information and referral is a resource for persons needing to find information on public, private, and human service transportation in the County. This includes transit route and schedule information, eligibility information, fares, as well as information on private and non-profit transportation providers. This serves as a resource for residents to call to receive both transportation referral services and trip planning assistance.

Senior Helpline Services will expand the current outreach and toll-free call-in helpline. This service (Transportation Information & Referrals) is available to disabled and senior populations and offers live responses to questions and determines the best transportation mode to meet the individual's needs and then facilitates that connection.

Deliverable: Call Center Data

Task 3: Coordinated Vehicle Maintenance Program

There are many beneficial features of a coordinated maintenance program and it was one of the most popular during the development of the Mobility Management Plan.

Senior Helpline Services will develop a maintenance/repair program with a discounted rate for vans owned and operated by agencies that reduce the load on public and paratransit buses.

Additional Ongoing Projects

- **Mobility Management Advocacy:** A mobility manager can play an important role in advocating for the needs of the population groups that it represents. Because they work closely with agencies and individuals in the human services sector, it is often in a strategic position to advocate for these special needs populations. Senior Helpline Services will continue to lead, grow and develop the newly formed group of leaders of the nine Bay Area counties volunteer driver programs called VITAL (Volunteers in Transportation Advocacy Link) in order to provide peer support and collaboration, develop industry standards, and define and share best practices, including volunteer driver training, to improve all providers efficiency and quality of service.
- **Form a Community-Based Organization (CBO) Transportation Provider Group;** staff/schedule meetings.
- **Grant Writing:** Mobility Managers have the potential to significantly impact available transportation services within their geographic area by supporting local agencies in their efforts to secure grant funding. Completing grant applications can be confusing and overwhelming. While larger agencies often have staff dedicated to the preparation of grant applications, smaller public and non-profit

human service agencies usually assign this responsibility to a program manager or other administrative team member. A human service agency may not have the time or the expertise to seek out grant opportunities and submit applications. Senior Helpline Services has done this as recently as November 2014, when we coordinated applications for 6 nonprofits for the Metropolitan Transportation Commission's (MTC) Enhanced Mobility of Seniors & Individuals with Disabilities Program (Section 5310) grant.

Project Deliverables

All deliverables will be submitted to County Connection in electronic format (either PDF or native software or both). At the end of the project Senior Helpline Services will provide County Connection with a CD-ROM containing the final version of all deliverables plus the supporting electronic files.

Timeline and Budget

Senior Helpline Services anticipates commencing work as early as the first week of January 2015 and ending approximately 18 months after with the possibility of extending it if the budget allows.

There is \$245,000 in available funds and we propose to complete our work for a cost that does not exceed that amount. This includes all labor and direct costs for Senior Helpline Services.

After these projects are up and running, they will be maintained and modified as needed and other projects will follow as outlined in the Mobility Management Plan. Any additional expenses incurred during the first 18 months will be covered with fundraising by Senior Helpline Services.

Elaine Welch RN, MBA
Executive Director
Senior Helpline Services
2014

Elaine has been an RN since 1971. In 1979, she earned her MBA from St. Mary's College in Moraga, California. Twenty-five years of her career were spent with Kaiser Permanente, primarily in the corporate offices, with responsibility for Medicare compliance in all Kaiser regions throughout the United States. She specialized in Medicare benefits and coverage, utilization, and quality of care and services for the elderly and disabled. After retiring in 1998, she became a long term care ombudsman for Contra Costa County, an adult literacy tutor and board member for Project Second Chance, Medicare consultant, senior advocate, and youth mentor - all on a volunteer basis. A combination of boredom and concern about the plight of seniors trying to age in their own homes, without proper support, brought her out of retirement in January 2002, to become the Reassurance Program Director for Senior Helpline Services (SHS). In August of that same year, she became the Executive Director. In September 2005, she started a free, door-through-door, volunteer driver program at SHS for otherwise homebound, ambulatory senior residents of Contra Costa County, called Rides for Seniors. Just over two years later she added a home safety/falls prevention component to that program. In January 2012, she added a call-in transportation information & referrals helpline to the agency's offerings and is currently working on expansion of the Rides for Seniors program to northern and central Alameda County. She serves as a presenter with the California Highway Patrol's AGE WELL/DRIVE SMART workshops where she addresses options for transportation after ceasing driving. She has recently formed a group of leaders of volunteer driver programs in the nine Bay Area counties called VITAL (Volunteers in Transportation Advocacy Link) who meet on a regular basis to provide support, mentoring, training, information, and work to advocate for the mobility needs of the seniors they serve. Mobility Management has become her specialty, and she is collaborating with organizations in other communities both in and outside of California to share best practices.

Senior Helpline Services Mobility Manager Timeline and Budget

Timeline			2015												2016												
			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun							
Form Advisory Committee/ Begin Meetings			█				█			█			█			█			█								
Complete Inventory			█																								
Produce Database						█																					
Website Development							█																				
Website Launch									█																		
Hard copy Inventory									█																		
Travel Training			█																								
Transportation Information & Referral								█																			
Coordinated Vehicle Maintenance															█												
Additional Projects			█																								
Project Cost			2015												2016												
Executive Director at .5 FTE	Base Rate	Hours	45	55	70	75	80	75	70	80	80	90	90	85	85	90	85	85	100	95							
	\$56.53	Cost	\$2,571	\$3,137	\$3,985	\$4,267	\$4,550	\$4,262	\$3,968	\$4,522	\$4,550	\$5,115	\$5,115	\$4,833	\$4,805	\$5,087	\$4,805	\$4,805	\$5,653	\$5,370							
Mobility Manager at 1.0 FTE	Base Rate	Hours	90	90	160	160	170	170	170	170	170	170	170	170	170	170	170	170	170	170							
	\$42.40	Cost	\$3,816	\$3,816	\$6,783	\$6,783	\$7,207	\$7,207	\$7,207	\$7,207	\$7,207	\$7,207	\$7,207	\$7,207	\$7,207	\$7,207	\$7,207	\$7,207	\$7,207	\$7,207							

Executive Director at .5 FTE	Total Hours	1,440
	Total Cost	\$81,400
Mobility Manager at 1.0 FTE	Total Hours	2,880
	Total Cost	\$122,100
Total Labor		\$203,500
Office/Admin Expenses		\$41,500
Total Expenses		\$245,000

RESOLUTION NO. 2015-015

**BOARD OF DIRECTORS, CENTRAL CONTRA COSTA TRANSIT AUTHORITY
STATE OF CALIFORNIA**

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**AUTHORIZING AWARD OF A CONTRACT WITH SENIOR HELPLINE SERVICES
TO PROVIDE PILOT MOBILITY MANAGEMENT SERVICES IN SUPPORT OF A
COUNTY-WIDE MOBILITY MANAGEMENT PLAN
IN AN AMOUNT NOT TO EXCEED \$245,000**

WHEREAS, the County of Contra Costa and the Cities of Clayton, Concord, the Town of Danville, Lafayette, Martinez, the Town of Moraga, Orinda, Pleasant Hill, San Ramon and Walnut Creek (hereinafter "Member Jurisdictions") have formed the Central Contra Costa Transit Authority ("County Connection"), a joint exercise of powers agency created under California Government Code Section 6500 *et seq.*, for the joint exercise of certain powers to provide coordinated and integrated public transportation services within the area of its Member Jurisdictions;

WHEREAS, County Connection's Board of Directors previously approved the mobility management project and adopted the county-wide Mobility Management Plan on October 10, 2013, which recommended the retention of a mobility manager;

WHEREAS, County Connection has received \$125,000 in federal New Freedom Cycle 5 funding to retain the services of a mobility manager to develop programs and projects included in the Mobility Management Plan; and

WHEREAS, CCTA has authorized the transfer of its \$120,000 New Freedom Cycle 3 grant to County Connection to be combined with County Connection's New Freedom Cycle 5 grant for the work associated with completing the Mobility Management Plan tasks;

WHEREAS, Senior Helpline Services has been identified as uniquely qualified to complete these tasks, given its previous and current experience performing similar services in Contra Costa County;

WHEREAS, Senior Helpline Services will provide pilot services to develop and coordinate the mobility management functions in Contra Costa County, including: completing an inventory of available services for seniors and those with disabilities, growing the information referral service, coordinating and standardizing travel training, and developing a coordinated maintenance and repair program;

WHEREAS, the Marketing, Planning & Legislation Committee recommends award of a contract to Senior Helpline Services to complete the remaining mobility management tasks outlined in the New Freedom grants, in an amount not to exceed \$245,000.

NOW, THEREFORE, BE IT RESOLVED that the Board of Directors authorizes the General Manager to execute an agreement with Senior Helpline Services, in a form approved by Legal Counsel, to provide pilot mobility management services in support of the Mobility Management Plan, in an amount not to exceed \$245,000, with the understanding that funding is

available from County Connection's federal New Freedom 5 grants (\$125,000) and the Contra Costa Transportation Authority's federal New Freedom 3 grant (\$120,000).

Regularly passed and adopted this 20th day of November, 2014 by the following vote:

AYES:

NOES:

ABSENT:

ABSTAIN:

Al Dessayer, Chair, Board of Directors

ATTEST

Lathina Hill, Clerk to the Board