



FISCAL YEARS 2020/21, 2021/22, AND 2022/23.

# Measure X Senior & Disabled Transportation Program

Program Application

## Required Contents

Applications are due via email to Stefania Castillo, program coordinator, ([stefania@tamcmonterey.org](mailto:stefania@tamcmonterey.org)) on **Thursday, January 16, 2020 at 5:00 P.M. PST.**

The application must be submitted in the format noted below and include:

- Proposal Signature Page (PDF format)
- Program Application (Word Document)
- Project Budget (Excel Spreadsheet)
- Project Timeline (Word Document)



## Proposal Signature Page

If selected for funding, the information contained in this application will become the foundation of the **Funding Agreement** with TAMC. To the best of my knowledge, all information contained in this application is true and correct.

**Signed:**

**Print Name:**

Jessica McKillip

**Title:**

Executive Director

**Date:**

1/16/20

## Applicant Information

**Implementing Organization's Name:**

Independent Transportation Network  
Monterey County (ITNMontereyCounty)

**Grant Amount Request:**

\$930,000.00

**Contact (name and title):**

Jessica McKillip, Executive Director

**Contact Email:**

jessica.mckillip@itnmontereycounty.org

**Contact Phone Number:**

831-402-4705

If the applicant is not a 501(c)(3) organization, then the applicant must partner with an organization that is and can serve as a fiscal sponsor. The applicant must complete the following information about the fiscal sponsor.

**Name of Fiscal Sponsor:**

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**Contact (name and title):**

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**Contact Email:**

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**Contact Phone Number:**

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**Tax ID #:**

**45-3745255**

## Program Application

### Project Title

*Provide a brief project title.*

Dignified Transportation for Seniors and Visually Impaired Adults

### Organization's History

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

ITN *Monterey County* is a 501(c)(3) non-profit organization providing individual transportation to seniors 60+ and visually-impaired adults age 18+. Established in 2011, ITN *Monterey County* began delivering rides in January 2012 throughout the Monterey Peninsula area and the City of Salinas, along the Highway 68 corridor, and Carmel by the Sea. Our service area has grown to 12 communities, now including Carmel Highlands, Carmel Valley, Prunedale, and Castroville. Most recently we celebrated the milestone of delivering our 50,000 ride in May 2019, and held a community celebration in August 2019 at BMW of Monterey.

ITN *Monterey County* was started as a Leadership Monterey Peninsula class project. Surveys conducted by Monterey County Area Agency on Aging identified transportation as one of the top two unmet needs by seniors (tied with access to food). In 2010, a Leadership Monterey Peninsula class group conducted an assessment of senior transportation models and identified ITN *America* as the best fit for replication in Monterey County. Using the ITN *America* model allowed the group to not “reinvent the wheel” and provided a model that could be implemented to serve the transportation needs of Monterey County’s seniors. The 2010 Leadership Monterey Peninsula group started the process to become a 501(c)(3) non-profit, began fundraising for the program, and recruited ITN *Monterey County*’s first Board of Directors.



ITN *Monterey County* is the ONLY non-profit organization in the area that provides arm-through-arm, door-through-door transportation, 24 hours a day, 7 days a week, for any reason in our service area. We deliver this vital service through a network of volunteer and part-time paid drivers who undergo a mandatory background check and training before giving a ride. Volunteer drivers drive at their convenience in their own cars and give rides that are typically less than 20 minutes. They meet interesting people while helping others, plus they earn credits for themselves or a loved one, or receive mileage reimbursement.

ITN *Monterey County* is an affiliate of ITN *America*®, founded by Katherine Freund in Portland, Maine. When an 84-year-old driver injured her 3-year-old son, she was determined to change a transportation system that wasn't meeting the needs of an aging population. She formed ITN in 1995; it became a national organization in 2004. ITN *Monterey County* is one of thirteen affiliates that operate in 11 states - we are the only ITN in California.

### **Project Summary and Need (1,000 words max.)**

*Describe the project to be funded, including the main services provided and any expected project deliverables. Explain the transportation need that the project is addressing.*

Older adults in the United States rely on private automobiles for transportation, taking 9 out of 10 personal trips in cars, either as drivers or passengers. According to the Center for Disease Control, “In 2016, about 7,400 older adults (aged 65+) were killed and more than 290,000 were treated in emergency departments for motor vehicle crash injuries. **This amounts to 20 older adults killed and 794 injured in crashes on average every day.** There were almost 42 million licensed older drivers in 2016, which is a 56 percent increase from 1999.” ITN *Monterey County* partners with California Highway Patrol to deliver regional “Age Well Drive Smart” workshops geared towards drivers over 55, utilizing resources the CA DMV Ombudsman program and local agencies offer to improve public safety for all, especially our ever growing aging population.

Additionally, a Transportation Needs Assessment of Older Adults conducted by National Aging and Disability Transportation Center in December of 2018, found “*Those who give up driving face big barriers to getting around and can no longer do the things they need and want to do, facing physical isolation, frustration, and feel dependent and trapped.*” The survey reported, close to 9 in 10 who stopped driving have been negatively impacted; especially for adults with disabilities; barriers included expensive, time restrictions, and sparse transportation options.



This national problem is very much a local problem within Monterey County. It is estimated that by 2030, 1 in 4 of Monterey County residents will be seniors over the age of 60. Providing a solid infrastructure for existing systems now is necessary in order to stay viable for the projected continued growth of the senior population in Monterey County.

ITN *Monterey County* will continue to provide 24 hour/7 days-a-week transportation to help seniors (age 60 and older) and visually-impaired adults (age 18 and older) to remain independent and active in Monterey County. We will continue to offer dignified transportation for customers in private autos, insured and inspected, with arm-through-arm, door-through-door service with affordable fares provided by volunteer drivers and on-call paid drivers. Rates charged are less expensive than a cab and less than half of what it costs ITN *Monterey County* to deliver the ride. There is a low-income fee structure for riders who cannot afford the regular service which expanded beyond medical and grocery trips, to support every ride taken in 2019.

Each Member opens a Personal Transportation Account™, which is debited to pay for their rides, so no cash is handled during the trip and tipping is not allowed. Our scholarship program for eligible low-income individuals provides the same quality of service at a reduced price, which is subsidized by various organizations in the community as well as donations from our own volunteer drivers, member riders, and their families. Another way for members to afford our service is by trading the car they no longer drive for credit to their personal transportation account.

Our proprietary software program, ITN RIDES®, registers member characteristics that help us tailor our services to meet their special needs: additional load time, special escort instructions for stairs and entrances, hearing and visual impairment, dementia, anxiety disorders, use of walkers and wheelchairs, and type of automobile they can/cannot access comfortably are entered into the system for each member. Drivers are then informed of a member's needs, along with their ride assignment, to serve each individual appropriately.

ITN *Monterey County*'s has delivered 55,262 rides to date. Our membership is currently 508 and growing daily. Over 75% are women, 48% rely upon mobility devices/assistance, and 55% live alone. A large majority (67%) still possess a vehicle and valid license, however only 35% drive.

**Current membership by location is:**

Salinas: 26%

Carmel/Carmel-by-the-Sea/Carmel Valley: 21%

Monterey: 18%



Pacific Grove: 13%  
Marina: 8%  
Pebble Beach: 6%  
Seaside: 7%  
Castroville: 1%

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

ITN *Monterey County* currently relies on two full-time salaried staff, 3 part-time dispatchers, 6 part-time drivers, an office assistant, and over 40+ volunteer drivers support core operations. We anticipate continued growth including expansion efforts in rural areas of Monterey County to increase the demands of both paid dispatching and driver resources. Additional personnel will be essential for operational stability to continue delivering highly individualized transportation.

## Project Questions

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



## Program Purpose & Goals – 25 points

1. Explain how your organization currently supports the transportation needs of seniors and/or people with disabilities. (500 words max.)

*"Currently, there are about 8.4 million senior citizens who depend on others for their transportation. Shortly, the number of older drivers will more than double, making the issue of senior transportation even more critical. In fact, according to the Administration on Aging, by the year 2030, the number of drivers over age 85 will be 4–5 times what it is today. Because America's roads and automobiles are not designed for the existing elderly population, and because the skills and abilities associated with driving tend to diminish with age, viable alternate forms of transportation for the elderly will continue to be an important issue for years to come." ~FamilyCare America, Inc. 2019*

In today's society many equate our car keys with independence to continue an active and productive life. ITN~~MontereyCounty~~ delivers a model of individualized transportation which eases the transition from the driver's seat to being a passenger by offering riders the ability to schedule trips for any reason when it's most convenient for them. Our service is delivered in individual vehicles providing the same convenient mode of travel as they're used to, which ultimately reduces stress, anxiety, and social isolation.

Recent rural expansion efforts have included 'Ride Service Agreements' with Aspire Healthplan to allow for medical trips outside of our current service area, improving the health of our community, while gathering critical data on rural transit cost and needs. Our goal through 20/21 FY, is to continue fostering relationships with community based organizations beyond our current service area, increasing our volunteer support to allow for expansion of services in rural areas of Monterey County. Acquiring fuel efficient fleet vehicles will assist expansion efforts beyond any volunteer capacity.

ITN~~MontereyCounty~~ expects the following measurable results:

1. Increase our dues paying membership by 80 (or 15%) annually, focused on residential growth in Castroville, Carmel Valley, Prunedale, Salinas, and Spreckels rural areas by 5%.

2. Recruit and train ten new volunteers, to include recruiting at least two from Salinas and rural areas. This will be achieved through various types of marketing to include attending regional based community events; and through the planning and execution of at least six "Age Well Drive Smart" workshops with community partners - California Highway Patrol, Monterey-Salinas Transit, Department of Motor Vehicles and Valley Hearing Center.
3. Develop strong community connections to support an expansion plan to serve rural areas of Big Sur Coast, North County, and South County regions by 2022; including acquisition of vehicles to reduce financial burdens.

2. Does your organization provide transportation or purchase transportation from others? Explain. (500 words max.)

ITN *Monterey County* identifies as a direct transportation service non-profit organization which provides rides 24/7 for any reason to established member riders. We do not purchase transportation services from other local providers.

3. Explain how the project coordinates with, and avoids duplication of, other efforts in the county to increase (provide new or alternate) transportation services to seniors and/or people with disabilities. (500 words max.)

In fiscal year 2018-19, ITN *Monterey County* became a Taxi Voucher Distribution Center in an effort to assist all residents of Monterey County to understand and consider the voucher system benefits offered by Monterey-Salinas Transit. Additionally, ITN *Monterey County*'s Executive Director serves on the Mobility Advisory Council and Monterey County's Area Agency on Aging committee, where information on regional programs centered around seniors are shared. Collaborative connections like these ensure not only our member riders, but inquiring general public receive information on available transportation services to find the most financially economical way to take the trips they wish to take. Our staff diligently follow up to general inquiries offering to provide local Senior Resource Guides or direct contact information when appropriate.





In May 2019, Monterey County’s Area Agency on Aging asked transportation partners to unite in an effort to have larger community representation at the annual Board of Supervisors Older American’s Act Proclamation ceremony. Alliance on Aging activated a ‘Ride the Bus with Us’ outreach effort for residence in South County, where a staff person would join them on the route into Salinas. ITN*MontereyCounty* sourced four volunteer drivers to assist with suttling riders from the MST bus station to the County offices. It was a successful collaboration resulting in over 14 South County residents participating.

ITN*MontereyCounty* continues to attend resource fairs and community based events for outreach purposes, many of which are done in collaboration with staff from Alliance on Aging, Blind and Visually Impaired Center, Monterey Salinas Transit, and Veterans Transition Center. Increased efforts with MST resulted in 3 joint service presentations to local social clubs including Rotary, Lions, and ThriftyNickles.

## Program Benefits – 30 points

4. Explain how the Measure X grant funding will increase (provide new or alternate) transportation services to:
  - a. Give seniors more transportation options. (500 words max.)

ITN*MontereyCounty* was on the brink of closing its doors and being unable to provide reliable transportation to its members prior to Measure X cycle 1 funding. Since 2018, our membership and unique riders has increased by over 70% with the average number of monthly rides in a given quarter climbing to over 720 in the past two fiscal years. Our objective is to continue maintaining growth in our current service areas while developing vital resources to support expansion efforts in the coming years. These benchmarks of success are directly related to the funding provided by Measure X, volunteers, health providers, and local community foundation grants. The ability to operate and execute the goals listed above are directly tied to receiving continued funding especially for growth efforts in rural areas.

- b. Support independent travel by people with disabilities. (500 words max.)

ITN*MontereyCounty* continues to provide individualized transportation for our members, which includes rider profiles identifying any particular assistance or requirements to ensure each and every one of our riders are supported as well as respected during the ride. Our current membership includes 15% who identify as Blind or Visually Impaired; almost 50% utilize a walker, cane, and/or wheelchair. Over 58% live alone with a median age of 84 years old; and 5% with having Alzheimer's disease or dementia.

In Fall of 2019, ITN*America* applied to receive funding from the Federal Transit Administration, ITN*MontereyCounty* was listed as one of the three partnering subgrantees for an Integrated Mobility Innovation grant exclusively for rural transportation needs. While this funding has not been secured to date, it would include the acquisition of at least one ADA accessible vehicle for ridesharing transit services.

- c. Provide safer and more reliable senior transportation services. (500 words max.)

ITN*MontereyCounty* from inception has focused on safety and independence of our member riders. While each driver is required to undergo a background screening and training prior to delivering rides. In 2019, our core operational staff and paid drivers were all enrolled in a CA DMV 'Pull Notification' program which provides information regarding any driving, traffic citations, or incidents to be reviewed within 48 hours of occurrence. Efforts to expand this program to include all volunteer drivers will begin in 2020.

### Feasibility – 15 points

5. Are there any actions required by other organizations to implement the proposed project? (500 words max.)

ITN*America* launched a supplemental rural transit program ITN*Country*, which does not require affiliate providers to keep the same 24/7 service for regions beyond their current service areas. ITN*MontereyCounty* will pursue the opportunity of ITN*Country* to support rural expansion efforts upon secured funding.



6. What will happen to the proposed project if Measure X grant funding is not awarded (e.g. loss of matching funds, impacts on overall project vision, project momentum, timing difficulties, etc.)? (500 words max.)

ITN *Monterey County* relies heavily upon community supporters and local foundations to keep ride costs reasonable for our membership. Over 60% of operational costs are deferred from being charged to riders and rates for services have not increased since 2017. While our goals for rural expansion rely exclusively on Measure X cycle two funding; our Board of Directors has worked diligently to ensure safeguards are in place to sustain core operations.

In 2019, we expanded our Ride Service Agreement with Aspire Health Plan to include rural areas of Aromas, Big Sur coast, and south of Salinas to King City. Our primary objective with this pilot medical service expansion was to gather imperative data surrounding cost and execution needs to ensure any future service growth could be managed. We're analyzing the trip data from this initial pilot to better estimate the needs and cost to provide service to Monterey County's rural areas. In the last year, only a dozen ride requests were received with 60% not being provided due to limited driver availability, or other operational limitations.

### **Geographic Equity – 15 points**

7. Identify which sub-area of Monterey County (North Monterey County, Greater Salinas Area, Monterey Peninsula, South Monterey County, Big Sur Coast) this project will benefit. (500 words max.)

ITN *Monterey County* currently serves the greater Salinas area including Castroville, Prunedale, and Spreckels; all of the peninsula based cities from Marina into Carmel Highlands and Carmel Valley. Continued Measure X funding will allow for us to develop a growth plan to sustain expanding into rural areas of Big Sur, North County, and South County.



8. Identify which sub-areas (North Monterey County, Greater Salinas Area, Monterey Peninsula, South Monterey County, Big Sur Coast) the proposed project will provide trips. (500 words max.)

ITN *Monterey County* provides members transportation in the greater Salinas area including Castroville, Prunedale, and Spreckels; all of the peninsula based cities from Marina into Carmel Highlands and Carmel Valley. Proposed expansion efforts will develop after targeted outreach in rural areas for volunteer drivers and community support by fiscal year 2022. Our goal is to continue providing medical trips outside our current service area for Aspire Health Plan sub-riders through the plan development of a more permanent service being offered in North County and South County regions. Ideally, the acquisition of fuel efficient vehicles will result in accommodating service requests stretching as far south as King City, into Big Sur, and north to include Pajaro and Aromas.

9. Describe partnerships with other entities and their corresponding roles (if any) in the proposed project. (500 words max.)

ITN *Monterey County* is grateful for partnerships that have continued to support our organizational growth over the past eight years particularly Alliance on Aging, Blind and Visually Impaired Center, Monterey Salinas Transit, and Monterey County Area's Agency on Aging whom all recognize the need and leverage ways to improve access to affordable transportation within rural North and South Monterey County. Our expansion goals will not be successful without continued collaboration and outreach efforts moving into 2021. Additionally, efforts to expand our sponsoring of 'Age Well Drive Smart' workshops with CHP and CA DMV Ombudsman's beyond Salinas and the peninsula to include venues or senior centers in Castroville, Prunedale, Spreckels, and other rural communities.

### **Cost Effectiveness – 15 points**

10. Explain how your organization's services are provided:
  - a. Number of trips and average cost per trip. (500 words max.)



ITN *Monterey County* has provided 55,262 trips since inception in 2012 and provided 9,784 trips in fiscal year 2018/19. Providing transportation for customers in private autos, insured and inspected, with arm-through-arm, door-through-door service charging affordable fares provided by volunteer drivers and part-time paid drivers. While the average ride of 5 miles, costs approximately \$41 to execute, riders will only pay approximately \$12.75. Our rate is structured to be feasible, with a \$4.00 pick up fee and \$1.75 per mile with a minimum of \$7.50 being charged for rides under 2 miles. Annual dues are \$60 for an individual and \$80 for a family membership (two or more living in the same home/location); low-income riders only pay \$25 for annual dues, the balance on their transportation account is reduced to \$25; allowing them to enroll for \$50, and receive \$7.50 sponsorship for every scheduled ride.

Everyone who uses the service becomes a dues-paying member of the organization. They may ride as frequently as they choose and for any purpose. If they schedule the ride the day prior, they receive a large discount (40%), and if they agree to share their ride, they receive a further discount (20%). As a result, 97% of trips are voluntarily scheduled in advance, and most riders are pleased to share their ride. Volunteer drivers give rides at their convenience in their own cars which are typically less than 20 minutes. They earn credits for their future or a loved one, or can request occupied mileage reimbursement.

b. Number of non-trip mobility services provided and average cost per non-trip mobility service provided. (500 words max.)

ITN *Monterey County* does not currently provide or charge our member riders for any non-trip mobility services. (average cost per non-trip mobility service is Not Applicable since ITN *Monterey County*'s Measure X grant request is based on the actual arm-through-arm, door-through-door transportation service provided by ITN *Monterey County*)

11. Submit a completed Project Budget.

*The project budget provides a cost estimate reflecting all costs associated with the project by fiscal year. Identify costs to be funded by the Measure X grant and costs covered by other funding sources (see **Appendix A** of the Program Guidelines for a sample Project Budget template).*

## ITNMontereyCounty ~ Individualized Transportation for Seniors

EXPENSES	FY 20/21	FY 21/22	FY 22/23	TOTAL Measure X Budget	TOTAL Funds **	TOTAL Project Cost
<b>Personel Expenses</b>						
Transportation & Ops Manager (Salary)	\$ 40,000.00	\$ 42,000.00	\$ 42,000.00	\$ 124,000.00	\$ 29,305.00	\$ 153,305.00
Executive Director (Salary)	\$ 55,000.00	\$ 57,500.00	\$ 60,000.00	\$ 172,500.00	\$ 86,232.00	\$ 258,732.00
Driver Wages	\$ 58,000.00	\$ 60,000.00	\$ 62,000.00	\$ 180,000.00	\$ 98,200.00	\$ 278,200.00
Admin & Dispatch Wages	\$ 45,000.00	\$ 47,000.00	\$ 50,000.00	\$ 142,000.00	\$ 124,267.00	\$ 266,267.00
Health Benefits (Salary Staff)	\$ 6,000.00	\$ 7,000.00	\$ 8,000.00	\$ 21,000.00	\$ 17,750.00	\$ 38,750.00
Payroll Taxes and Workers Comp	\$ 14,000.00	\$ 15,000.00	\$ 15,000.00	\$ 44,000.00	\$ 96,090.50	\$ 140,090.50
<b>Total Personel Expenses</b>	<b>\$ 218,000.00</b>	<b>\$ 228,500.00</b>	<b>\$ 237,000.00</b>	<b>\$ 683,500.00</b>	<b>\$ 451,844.50</b>	<b>\$ 1,135,344.50</b>
<b>Rural Pilot Expansion Expenses</b>						
Marketing/Outreach	\$ 8,000.00	\$ 8,500.00	\$ 8,500.00	\$ 25,000.00	\$ -	\$ 25,000.00
Vehicle Acquisition (Gas Efficient)	\$ -	\$ 45,000.00	\$ 20,000.00	\$ 65,000.00	\$ -	\$ 65,000.00
Mileage & Gas Reimbursement	\$ 1,500.00	\$ 3,000.00	\$ 5,000.00	\$ 9,500.00	\$ 3,500.00	\$ 13,000.00
ITNAmerica - ITNCountry Fee	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 7,500.00	\$ -	\$ 7,500.00
Fleet Vehicle (Insurance, Reg, Maintenance)	\$ -	\$ 4,500.00	\$ 6,000.00	\$ 10,500.00	\$ -	\$ 10,500.00
<b>Total Personel Expenses</b>	<b>\$ 12,000.00</b>	<b>\$ 63,500.00</b>	<b>\$ 42,000.00</b>	<b>\$ 117,500.00</b>	<b>\$ 3,500.00</b>	<b>\$ 121,000.00</b>
<b>Operational Expenses</b>						
Bank and Professional Fees (Contractors)	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 6,000.00	\$ 24,000.00	\$ 30,000.00
Marketing Publications (Outreach)	\$ 8,000.00	\$ 6,500.00	\$ 5,000.00	\$ 19,500.00	\$ 75,400.00	\$ 94,900.00
Rent, Office Utilities and Communications	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 30,000.00	\$ 57,200.00	\$ 87,200.00
Fleet Vehicle (Insurance, Reg, Maintenance)	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 6,000.00	\$ 17,000.00	\$ 23,000.00
Mileage & Gas Reimbursement	\$ 20,000.00	\$ 19,000.00	\$ 18,000.00	\$ 57,000.00	\$ 82,750.00	\$ 139,750.00
Staff and Volunteer (Training & Travel)	\$ 1,500.00	\$ 1,500.00	\$ 1,500.00	\$ 4,500.00	\$ 27,500.00	\$ 32,000.00
Affiliate Fee	\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 6,000.00	\$ 33,640.00	\$ 39,640.00
<b>Total Operational Expenses</b>	<b>\$ 45,500.00</b>	<b>\$ 43,000.00</b>	<b>\$ 40,500.00</b>	<b>\$ 129,000.00</b>	<b>\$ 317,490.00</b>	<b>\$ 446,490.00</b>
<b>TOTAL GRANT REQUEST</b>	<b>\$ 275,500.00</b>	<b>\$ 335,000.00</b>	<b>\$ 319,500.00</b>	<b>\$ 930,000.00</b>	<b>\$ 772,834.50</b>	<b>\$ 1,702,834.50</b>

\*\* Matching Funds are unsecured projections based on past 5 years income sources





FISCAL YEARS 2020/21, 2021/22, AND 2022/23.

# Measure X Senior & Disabled Transportation Program

## Project Timeline

**ITNMontereyCounty:** Dignified Transportation for Seniors and Visually Impaired adults in Monterey County

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## Project Tasks

### Project Initiation

#### Task 1.1 Project Kick-Off Meeting

- **Brief Task Description:** *ITNMontereyCounty will welcome TAMC and other project partners to discuss various grant procedures and project expectations including but not limited to quarterly reporting, or any other relevant project elements.*
- **Project Deliverable:** *Meeting Notes and Signed Grant Funding Agreement*
- **Expected Completion Date:** *June/July 2020*

#### Task 1.2 Project Monitoring

- **Brief Task Description:** *Continual project monitoring of projected outcomes and finances.*
- **Project Deliverable:** *Monthly or Quarterly project reports submitted in a timely manner*
- **Expected Completion Date:** *Ongoing - Provided quarterly unless otherwise requested*

## **Public Outreach & Marketing**

### Task 2.1 Expand Advertising & Volunteer Recruitment

- **Brief Task Description:** *ITN Monterey County staff will attend and disseminate information at various community meetings and public events to increase awareness of services with a focus on volunteer recruitment and community support.*
- **Project Deliverable:** *Increased program awareness, volunteer recruitment, marketing materials and ads delivered in Spanish; collaborate with community partners*
- **Expected Completion Date:** *Ongoing throughout 20/21-22/23 FY's*

### Task 2.2 Community Safety Presentations

- **Brief Task Description:** *Coordinate community presentations with California Highway Patrol, CA DMV Ombudsman's, MST and other local agencies for adults over 55 who still drive*
- **Project Deliverable:** *Improving public safety; increased awareness of alternative transportation methods within Monterey County; Volunteer driver recruitment opportunity*
- **Expected Completion Date:** *Ongoing throughout 20/21-22/23 FY's*

### Task 2.3 Community Representation

- **Brief Task Description:** *Participate in bi-monthly meetings of MST's Mobility Advisory Committee, Monterey County's Area Agency on Aging and Legislative & Advocacy panel*
- **Project Deliverable:** *Community partnerships; Meeting notes; Increased transportation program knowledge among non-transportation committee members*
- **Expected Completion Date:** *Ongoing throughout 20/21-22/23 FY's*

## **Transportation Service (Operations)**

### Task 3.1 Provide Rides on request

- **Brief Task Description:** *Scheduling and delivering dignified safe transportation 24/7*
- **Project Deliverable:** *Monthly and Quarterly rides reports*
- **Expected Completion Date:** *Ongoing throughout 20/21-22/23 FY's*

### Task 3.2 Job Posting for Drivers

- **Brief Task Description:** *Complete recruitment process for selection of qualified drivers with clean background & driver history reports, possessing a desire to work with aging adults.*
- **Project Deliverable:** *Job Posting; Resumes; DMV & Background reports; Increased personnel*
- **Expected Completion Date:** *October 2020*

### Task 3.3 Driver Training & Safety

- **Brief Task Description:** *Expand DMV 'Pull Notice' reporting program to include all drivers*
- **Project Deliverable:** *Improved safety and record retention; Reduced insurance liabilities*
- **Expected Completion Date:** *December 2020*

## Rural Pilot Expansion

### Task 4.1 Develop growth plan for rural areas of Monterey County

- **Brief Task Description:** *Leverage community resources and volunteers to support ride requests beyond medical needs in rural expansion areas*
- **Project Deliverable:** *Increased transportation resources in rural areas*
- **Expected Completion Date:** *Drafted by July 2021; Implemented 21/22-22/23 FY*

### Task 4.2 Project Promotion & Volunteer Recruitment

- **Brief Task Description:** *Coordinate with civic and community partners to disseminate information at community meetings and public events to increase awareness of services with a focus on volunteer recruitment and community support.*
- **Project Deliverable:** *Monthly meeting logs; Increased program awareness, bilingual volunteer recruitment, additional marketing materials and ads delivered in Spanish*
- **Expected Completion Date:** *Ongoing throughout 20/21-22/23 FY's*

#### Task 4.3 Job Posting for Bilingual Drivers

- **Brief Task Description:** *Complete recruitment process for selection of qualified drivers with clean background & driver history reports, possessing a desire to work with aging adults.*
- **Project Deliverable:** *Job Posting; Resumes; DMV & Background reports*
- **Expected Completion Date:** *August 2021*

#### Task 4.3 Purchase Fleet vehicles

- **Brief Task Description:** *Secure fuel efficient vehicles for rural, long distance transportation*
- **Project Deliverable:** *Vehicle quotes; Vehicle Maintenance plan*
- **Expected Completion Date:** *October 2021*

### Fiscal Management

#### Task 5.1 Financial Review

- **Brief Task Description:** *Review all financial reports and ensuring budgetary controls*
- **Project Deliverable:** *Monthly Financial reports; Annual tax filings*
- **Expected Completion Date:** *Monthly & Annual throughout 2023*

#### Task 5.2 Quarterly invoicing & progress reports

- **Brief Task Description:** *Staff will compile expense documents and provide progress stats*
- **Project Deliverable:** *Invoice documents; Rides progress reports*
- **Expected Completion Date:** *Quarterly throughout 2023*

#### Task 5.3 Annual reports

- **Brief Task Description:** *Reporting on progress of previous years achievements or barriers to meeting expected goals.*
- **Project Deliverable:** *Annual report; achieved goals and/or pending progress; rider statistics.*
- **Expected Completion Date:** *Annually throughout 2023*



**BOARD OF DIRECTORS**

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Mary Brusuelas, *Secretary*  
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Teresa Sullivan

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*Medicare Information & Counseling*

*(HICAP)*

*Nursing Home Information &*

*Advocacy (OMBUDSMAN)*

*Senior Peer Counseling*

*Tax Counseling for the Elderly*

*Transportation Assistance*

*Benefits Checkup*



280 Dickman Avenue  
Monterey, CA 93940  
831-646-1458 Phone  
831-646-1232 Fax

247 Main Street  
Salinas, CA 93901  
831-655-1334 or 831-758-4011 Phone  
831-655-8781 Fax

Spirals Consignment  
& Benefit Shop  
570 Lighthouse Avenue  
Pacific Grove, CA 93950  
831-383-5030 Phone

**AllianceOnAging.org**

January 14, 2020

Ms. Stefania Castillo, Program Coordinator  
55 Plaza Circle Suite B  
Salinas CA 93901

\Re: Measure X Grant proposal support letter

Dear Stefania:

Alliance on Aging (AOA) is grateful for the opportunity to be among the TAMC funded organizations providing transportation services and resources to seniors and people with disabilities in Monterey County community. We are looking forward to working more closely with the Independent Transportation Network of Monterey County (ITN) in this next grant cycle.

We have developed a clearer understanding of the transportation challenges faced by seniors and people with disabilities and the significant gaps in those services in South County and the other rural areas of the county.

In this new grant cycle, Alliance on Aging is proposing to focus its advocacy efforts on working with City officials, community members and ITN to expand transportation options in South County. ITN will join us in this advocacy effort. ITN is also proposing a pilot program to expand their transportation model in rural areas. It is a timely opportunity to strengthen AOA's partnership with ITN by working with them to promote their services and help to recruit volunteer drivers from South County.

We look forward to continuing to grow our partnership with TAMC and ITN in our mission to meet the transportation needs of seniors and people with disabilities. Please contact me if you have any questions regarding this letter of support (831-655-4240).

Sincerely,

Teresa Sullivan  
Executive Director



## Measure X: Senior & Disabled Mobility Grant Program

### Letter of Support

January 13, 2020

To whom it may concern:

Monterey – Salinas Transit (MST) is the only transit provider that serves Monterey County and provides an important service to residents by offering mobility options for seniors, people with disabilities, and Veterans. We have enjoyed history and successful partnership with ITNMontereyCounty to help our customers maintain their independence through mobility options.

MST's mission has been supported by the ITNMontereyCounty through their continuous support for MST's mobility programs to include the taxi voucher for seniors, as well as participating in community outreach events. Also, ITNMontereyCounty has participated in MST's Mobility Advisory Committee for many years and has advocated for transportation programs and amenities that increase the availability and accessibility of community transportation services for our clients. In 2014, ITNMontereyCounty provided their support to MST's Measure Q ballot, a 1/8-cent sales tax to protect existing and develop new programs for persons with disabilities, seniors, and Veterans.

ITNMontereyCounty's project proposal to fund a pilot project to expand services in rural areas of the county will enhance coordination with MST in providing transportation services for seniors and persons with disabilities as well as fill gaps in mobility options. We have worked closely with ITNMontereyCounty for more than five (5) years and feel confident expressing our full support for their project.

Lastly, with MST's full support, please consider the grant application submitted by the ITNMontereyCounty for the Measure X: Senior & Disabled Mobility Grant.

Sincerely,

A handwritten signature in black ink, appearing to read "Cristy Sugabo". The signature is fluid and cursive, with the first name being the most prominent.

Cristy Sugabo  
Mobility Services Manager  
Monterey-Salinas Transit