



## 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:**

November 25, 2022

## Applicant Information

<b>Implementing Organization's Name:</b>	Independent Transportation Network Monterey County (ITNMontereyCounty)
<b>Grant Amount Request:</b>	\$938,000.00
<b>Contact (name and title):</b>	Jessica McKillip, Executive Director
<b>Contact Email:</b>	<a href="mailto:Jessica.mckillip@itnmontereycounty.org">Jessica.mckillip@itnmontereycounty.org</a>
<b>Contact Phone Number:</b>	831-233-3447

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.

<b>Name of Fiscal Sponsor:</b>	N/A
<b>Contact (name and title):</b>	
<b>Contact Email:</b>	
<b>Contact Phone Number:</b>	

FISCAL YEARS 2023/24, 2024/25, AND 2025/26.

# Measure X Senior & Disabled Transportation Program

Program Application

## Required Contents

Applications are due via email to Aaron Hernandez, program coordinator, ([aaron@tamcmonterey.org](mailto:aaron@tamcmonterey.org)) on **Thursday, December 1, 2022 at 12:00 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)



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<b>Title:</b>	Executive Director
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**Tax ID #:**

**45-3745255**

## Program Application

### Project Title

*Provide a brief project title.*

Expanding Dignified Transportation in Monterey County for Seniors, Veterans, 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.*

ITNMontereyCounty is a 501(c) (3) non-profit organization providing individual transportation to seniors 60+ and visually-impaired adults age 18+. Established in 2011, ITNMontereyCounty 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. In 2019 we began pursuing the needs for medical trips outside our service area as part of a Ride Service Agreement with Aspire Healthplan. To date, ITNMontereyCounty has almost 700 riders, delivered over 77,000 rides and driven over 900,000 miles throughout the county. ITNMontereyCounty is honored to be a current recipient of Measure X funding which magnifies our efforts to continue addressing the transportation needs of seniors and keeping our commitment to expand services in areas that remain underserved.

Over the past 10 years our service area has grown to now include two rural pilot projects; NorthLine serving residents who live north of Salinas to the Santa Cruz and San Benito county borders, and ValleyLine runs south of Salinas through Soledad. Both rural projects focus on improving transportation for medical, grocery and pharmacy needs Monday through Friday 7am to 7pm; expanding our service scope to include Veterans in addition to Seniors over 60, and visually impaired adults. Recent milestones have been celebrating 10 years of service, reviving our annual "Volunteer Appreciation Dinner" and working diligently to build community collaborations to ensure our expansion projects are sustainable while improving transportation and isolation barriers in rural communities.



In 2010, a Leadership Monterey Peninsula class group conducted an assessment of senior transportation models and identified ITNAmerica to be fit for replication in Monterey County. Using the ITNAmerica model allowed the group to not “reinvent the wheel” and provided a model that could be easily implemented to improve 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 ITNMontereyCounty’s first Board of Directors.

ITNMontereyCounty is the ONLY non-profit organization in the county providing arm-through-arm, door-through-door transportation. Our affiliate service model operates 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.

ITNMontereyCounty is an affiliate of ITNAmerica®, 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 not meeting the needs of our aging population. She formed ITNPortland in 1995; and launched the national organization in 2004. ITNMontereyCounty is one of ten affiliates that operate in 9 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.*

"There are more than 41 million licensed drivers ages 65 and older on the roads in the United States. This is a 68% increase from 26 million since 2010. As a person ages, changes in health including problems with vision, hearing, and reflexes can affect driving skills. The risk of being injured or killed in a motor vehicle crash also increases." (National Institute on Aging) 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 CDC, in 2020 over 7,500 older adults were killed in traffic crashes, and almost 200,000 were treated in emergency rooms from crash injuries. **This means that each day, 20 older adults are killed and almost 540 are injured in crashes!** ITNMontereyCounty partners with California Highway Patrol to host regional “Age Well Drive Smart ” workshops geared towards drivers over 55, utilizing national statistics and collaborating with local agencies to improve public safety for all, especially our ever growing aging population.



This national problem is a very real and unresolved problem throughout Monterey County. Annually, Monterey County's Area Agency on Aging conducts a survey of local senior residents, which identifies transportation as one of the top three unmet needs; just under access to food and affordable housing. The challenge of relying on friends or family, navigating the public transportation system can force older adults to miss critical medical appointments or worse. According to the American Hospital Association, 3.6 million individuals forego medical care each year due to transportation issues. CDC estimates every \$1.00 spent on non-emergency medical transportation saves \$11.00 in healthcare costs. Our partnership with Aspire Healthplan allows us to make an impact locally; since we were fortunate to keep operating during a global pandemic, resulting in almost 60% of our trips on average being for medical purposes.

ITN *Monterey County* will continue to provide for the transportation needs of seniors making it easier to transition from the driver to passenger seat. Now participating in a Federal Transit Administration (FTA) grant for ITN America's ITN Country project allowed us to partner with Alliance on Aging (AoA) to develop two community based regional projects geared towards serving Veterans, seniors, and visually impaired adults. Northline will serve Monterey County residents in Aromas, Bolsa Knolls, Boronda, Castroville, Elkhorn, Las Lomas, Moss Landing, Oak Hills, Pajaro, and Prunedale. ValleyLine is focused on residents living south of Salinas through Soledad. These rural project areas in North and South Monterey County were selected after analyzing community needs which identified public transit options to be limited in these areas. There are still additional needs for reliable transportation services in the Big Sur region and beyond Carmel Valley.

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 low-income program allows individuals 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 riders, drivers, and their families. Both rural pilot projects offer a sponsored membership fee during the FTA project and flat rate pricing as part of our efforts to keep transportation costs low. 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®, has been upgraded, now on the Salesforce platform which promises to improve operations and data tracking. Our members are now able to schedule rides through an online rider portal, update specific characteristics to help us tailor our services to meet their special needs: additional load time, any escort instructions for stairs and entrances, hearing and visual impairment, dementia, anxiety disorders, use of walkers and wheelchairs, and types of vehicles they can/cannot access comfortably are tracked in the system. Drivers are then informed of a member's needs, along with their ride assignment, to serve each individual appropriately.



To date, ITN *Monterey County* has delivered 77,910 rides which include rural trips. Our ridership count is 688, which includes 347 Aspire riders; almost 40% use some type of mobility aid, and 11% are low income. Over 70% are women, and almost 60% live alone. Current Membership including our ValleyLine and NorthLine rural projects by location is:

Aromas & Castroville: 1.5% (11)  
Carmel/Carmel by the Sea: 16% (112)  
Carmel Valley: 3% (21)  
Gonzales: .5% (3)  
Greenfield & King City (Aspire): 1% (7)  
Marina: 8% (54)  
Monterey: 18% (121)  
Moss Landing: .5% (4)  
Pacific Grove: 11.5% (80)  
Pebble Beach: 4% (28)  
Prunedale & Royal Oaks: 1% (8)  
Salinas: 27% (185)  
Seaside: 7% (47)  
Soledad: 1% (7)

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

ITN *Monterey County* currently operates with a salaried Executive Director, a full-time Transportation & Operations Manager, 1 full-time and 2 part-time dispatchers, and 5 part-time drivers; along with 45+ active volunteer drivers currently support core operations. We're actively hiring to support our growth including staffing efforts in rural areas of Monterey County for both paid dispatching and driver resources. Additional personnel and volunteer support for rural projects will be critical for long-term operational stability.

## 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.)

ITNAmerica was born with the sole purpose of improving senior mobility. “Life~ It’s about going places! Shopping, visiting friends, trips to the doctor, but as we get older going places gets harder. Everything from walking up stairs to operating a car grows more difficult with age. We might turn to friends, neighbors’ and family members for help, but once we make the decision to stop driving it’s easy to find ourselves stranded. Life outside the driver’s seat can carry a heavy toll. We ensure outliving the ability to drive safely doesn’t lead to isolation.” – ITNAmerica.org

In today's society many of us 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.

Our rural project efforts launched primarily thanks to funding from Measure X, partnerships with Aspire Healthplan and AoA who continue to advocate and support our service efforts.

ITN*MontereyCounty* anticipates the following measurable results:

1. Increase our affiliate dues paying ridership by 90 (or 25%) annually; additionally increasing our rural ridership by 50 in both NorthLine and ValleyLine regions. Focusing outreach efforts at senior centers and veterans halls in unincorporated areas.
2. Recruit and train at least 8 new volunteers; at least 4 (50%) who reside or are willing to provide transportation in our rural regions. This will be achieved through various types of marketing and outreach in collaboration with AoA; in addition to regional “Age Well workshops” with community partners and California Highway Patrol.
3. Expand marketing efforts and community connections to ensure rural projects are sustainable in our current regions; pursuing Ride Service contracts to expand beyond Soledad; and on the Big Sur coast.
4. Participate in an evaluation to understand unmet transit needs and possible expansion of our services into areas of the Big Sur Coast, Carmel Valley beyond the village, and south of Soledad.

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



ITN *Monterey County* is a nonprofit transportation service organization providing dignified rides to established members. We do not purchase alternate transit services. Our rural projects aim to improve access to residents which may include providing a short trip to get them from home to the public transit depot so they can travel a further distance for a more affordable fare. Collaboration with MST and Alliance on Aging anticipates rural riders can benefit from enrolling in the MST Trips reimbursement program, allowing them to afford traveling more frequently, possibly even with ITN.

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.)

ITN *Monterey County* historically supported MST by enrolling seniors in the Taxi voucher program, although this has been underutilized especially now that our office is located at "The HUB" where Alliance on Aging conducts the same services for MST. Our Executive Director continues to serve on MST's Mobility Advisory Council and Monterey County's Area Aging on Aging committees. Collaborative connections like these ensure that not only our membership but the general public receive information about available transportation services to understand the most economical way to travel. Our staff is diligent to follow up with general inquiries of various senior service needs, and often provide the local Senior Resource Guide or direct referrals when necessary.

Our collaboration with AoA over the past year in the FTA ITN Country project facilitated the development of steering committees for both rural projects composed of residents, community stakeholders, elected officials and regional transit agency staff. We held monthly meetings which drove the development of affordable service, specific hours of operation, and including Veterans' an underserved population; all based on outreach and survey analysis from local residents. Critical discussion around a flat rate fare and the need to magnify and model existing in town public transit operations were key to securing community support. We intend to continue these meetings and efforts as the national grant concludes next year in an effort to ensure rural project success and sustainability.

## 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.)

It wasn't long ago that ITNMontereyCounty feared closing its doors due to unforeseen financial hardships. Over the past 5 years our core focus has been operational stability and understanding community needs for improved transportation beyond our affiliate service area. Our ValleyLine and NorthLine rural projects are dedicated to creating a reliable affordable travel option for Veterans in addition to adults with visual impairments and seniors living in unincorporated and rural regions. Growth is a delicate balance, and without funding to ensure we continue balancing growth in our current service area while dedicating additional resources and personnel for sustainability.

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

ITNMontereyCounty maintains a service model of providing individualized transportation for riders, which includes confidential profiles which identify particular assistance or requirements needed of our drivers to keep each and every one of our riders not only mobile but feeling supported and respected during their ride. Our current ridership includes 11% who identify as possessing a visual limitation; almost 40% rely upon a walker, cane, and/or wheelchair. Our rural project agreement with ITNAmerica under the FTA is focused on integrating mobility innovations which mandates that we provide direct services for anyone needing transportation regardless of their mobility limitations. We are still considering pursuing acquisition of a ADA accessible vehicle, or contracting for services with a local provider.

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

ITNMontereyCounty continues to focus on both the safety and independence of our members. While every driver is required to complete a background check and orientation prior to delivering rides; we continue to expand and require enrollment in a CA DMV 'Pull Notification' service providing prompt information regarding any driver traffic violations, citations or accidents within 48 hours. This requirement will extend to

all rural project drivers, and fleet vehicles acquired will all be equipped with a GPS camera, and recording features to ensure consistent driver safety while operating our vehicles with or without riders present.

## Feasibility – 15 points

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

In the past 10 years, ITNMontereyCounty has been fortunate to foster strong community connections, and push beyond our typical service model parameters to serve the greater community when transportation was the clear barrier/need. Although we are looking to brighter futures it wasn't too long ago a worldwide pandemic changed our daily operations; however that led to partnerships in delivering meals to sheltering seniors throughout the county. Our anticipated project scope does not require another entity for implementation. However, the proposed successes of this project rely immensely on continuing to grow support from both regional agencies and residents throughout the county.

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.)

Since inception our service model and mission has been delivering quality individualized transportation, while never charging the rider what it actually cost to deliver their ride. Relying heavily on community donors and local foundations in addition to Measure X funding has allowed us to keep fares affordable, and stabilized our financial capacity. However, our current fiscal budget has a \$60,000 deficit projected for the rural projects; primarily because our board believes strongly in expanding service to improve community needs. Without continued reliable funding to support both affiliate and rural projects ITNMontereyCounty will likely be forced to scale back expansion efforts, freeze membership enrollments, limit or cancel requested rides, or even increase rider fares.

## 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.)

Our affiliate service area benefits residents over 60 and visually impaired adults in the greater Salinas and Monterey Peninsula areas to include Carmel Valley to the village. Our rural projects benefit Veterans in addition to seniors over 60 and visually impaired adult residents; ValleyLine serves South Monterey County from Salinas to Soledad, NorthLine project serves all unincorporated communities in North Monterey County. We anticipate fostering regional partnerships and securing funding sources that will allow our ValleyLine project to grow further south during this grant cycle. Although the Big Sur Coast isn't a focus area for us today, it is an area of potential in the future.

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.)

Our affiliate service will provide individualized transportation in the greater Salinas area and Monterey Peninsula regions. ValleyLine is currently operating in South Monterey County which now includes Indian Springs, Las Palmas, River Road and Spreckels. Our NorthLine project spans to cover all unincorporated communities in North Monterey County, and will allow medical travel into Watsonville (under 8 miles outside Monterey County)

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

ITNMontereyCounty is grateful for so many extensive partnerships that have grown over the years to support both our rural expansion efforts including Alliance on Aging, Aspire Healthplan, Blind and Visually Impaired Center, Meals on Wheels of Salinas Valley, Monterey Salinas Transit, and Monterey County's Area Agency on Aging; all recognize the gaps of transportation service and the critical need to improve access to reliable transportation throughout the county. Our goals of a sustainable rural project expansion will not be successful without collaboration from these organizations in addition to many more. Additionally, we intend to continue expanding the 'Age Well' workshops with CHP into our rural service areas.

## 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.)

Since 2012, ITN*MontereyCounty* has provided reliable transportation for riders in private autos, insured and inspected, with arm-through-arm and door-through-door service charging affordable fares provided by volunteers and part-time paid drivers. To date we have delivered over 77,000 trips with the average ride in our affiliate service area taking less than 20 minutes. In the past fiscal year, we delivered 7721 rides at an average distance of 5.45 miles costing the rider \$13.55 while the true cost to the organization was \$58.75 a deficit of \$45.22 of which funds from local grants and private donors offset the gap. Volunteers also play a vital role in keeping our operational costs low.

Our rural pilot projects as part of the FTA national project aren't able to charge a membership fee, and upon its completion our board has agreed to honor the \$25 low income level. Our steering committees evaluated data which allowed us to set reasonably priced ride fares based upon distance of travel needs; in town trips under 8 miles cost \$8.00, including in town segments where the driver waits up to 20 minutes for grocery or pharmacy errands. Trips beyond in town are structured by mileage as follows: 8.1-15 miles \$10; 15.1-25 miles \$20; 25.01-35 miles \$30; over 35.1 miles is \$50. Transportation in these rural communities will inevitably take longer to deliver and cost more. Efforts in tracking actual ride cost will become more realistic as move into Rides 2.0 software.

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

ITN*MontereyCounty* does not provide or charge for any non-trip mobility services, and thus any cost per service is not applicable as well.



**11.** Submit a completed Project Budget. (See Attached Excel Document)

Project Budget

ITN Monterey County ~ Expanding Dignified Transportation in Monterey Co

EXPENSES	TOTAL Budget	FY 23/24	FY 24/25	FY 25/26	TOTAL Funds	TOTAL Project Cost
<b>Personel Expenses</b>						
Executive Director (Salary)	\$ 158,000.00	\$ 50,000.00	\$ 53,000.00	\$ 55,000.00	\$ 189,000.00	\$ 347,000.00
Transportation & Ops Manager (FT)	\$ 120,000.00	\$ 40,000.00	\$ 40,000.00	\$ 40,000.00	\$ 90,000.00	\$ 210,000.00
Dispatch & After Hours Wages	\$ 123,000.00	\$ 39,000.00	\$ 41,000.00	\$ 43,000.00	\$ 105,000.00	\$ 228,000.00
Driver Wages	\$ 156,000.00	\$ 49,000.00	\$ 52,000.00	\$ 55,000.00	\$ 64,000.00	\$ 220,000.00
Health Benefits	\$ 50,000.00	\$ 15,000.00	\$ 17,000.00	\$ 18,000.00	\$ 28,000.00	\$ 78,000.00
Payroll Taxes and Workers Comp	\$ 65,000.00	\$ 20,000.00	\$ 22,000.00	\$ 23,000.00	\$ 45,000.00	\$ 110,000.00
<b>Total Personel Expenses</b>	<b>\$ 672,000.00</b>	<b>\$ 213,000.00</b>	<b>\$ 225,000.00</b>	<b>\$ 234,000.00</b>	<b>\$ 521,000.00</b>	<b>\$ 1,193,000.00</b>
<b>Rural Program Expenses</b>						
ITNAmerica ~ ITNCountry Fee	\$ 5,000.00	\$ -	\$ 2,500.00	\$ 2,500.00	\$ 3,000.00	\$ 8,000.00
Marketing & Outreach	\$ 25,000.00	\$ 10,000.00	\$ 8,000.00	\$ 7,000.00	\$ 5,000.00	\$ 30,000.00
Volunteer Mileage & Gas Reimbursements	\$ 23,000.00	\$ 5,000.00	\$ 8,000.00	\$ 10,000.00	\$ 7,000.00	\$ 30,000.00
Low Income Rides & Membership Fees	\$ 16,000.00	\$ 3,000.00	\$ 5,000.00	\$ 8,000.00	\$ 2,500.00	\$ 18,500.00
<b>Total Rural Expenses</b>	<b>\$ 69,000.00</b>	<b>\$ 18,000.00</b>	<b>\$ 23,500.00</b>	<b>\$ 27,500.00</b>	<b>\$ 17,500.00</b>	<b>\$ 86,500.00</b>
<b>Operational Expenses</b>						
ITNAmerica Affiliate	\$ 15,000.00	\$ 6,000.00	\$ 5,000.00	\$ 4,000.00	\$ 18,600.00	\$ 33,600.00
Marketing Publications & Outreach	\$ 27,000.00	\$ 10,000.00	\$ 9,000.00	\$ 8,000.00	\$ 40,000.00	\$ 67,000.00
Professional Fees (Bank/CC & Contractors)	\$ 18,000.00	\$ 7,000.00	\$ 6,000.00	\$ 5,000.00	\$ 15,000.00	\$ 33,000.00
Fleet Expenses (Insurance, Reg. Maintenance)	\$ 24,000.00	\$ 9,000.00	\$ 8,000.00	\$ 7,000.00	\$ 29,000.00	\$ 53,000.00
Communications, Rent and Utilities	\$ 30,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 36,000.00	\$ 66,000.00
Mileage & Gas Reimbursement	\$ 33,000.00	\$ 12,000.00	\$ 11,000.00	\$ 10,000.00	\$ 43,000.00	\$ 76,000.00
Electric Vehicle Purchase	\$ 50,000.00		\$ 50,000.00		\$ 15,000.00	\$ 65,000.00
<b>Total Other Expenses</b>	<b>\$ 197,000.00</b>	<b>\$ 54,000.00</b>	<b>\$ 99,000.00</b>	<b>\$ 44,000.00</b>	<b>\$ 196,600.00</b>	<b>\$ 393,600.00</b>
<b>TOTAL GRANT REQUEST</b>	<b>\$ 938,000.00</b>	<b>\$ 285,000.00</b>	<b>\$ 347,500.00</b>	<b>\$ 305,500.00</b>	<b>\$ 735,100.00</b>	<b>\$ 1,673,100.00</b>

FISCAL YEARS 2023/24, 2024/25, AND 2025/26.

# Measure X Senior & Disabled Transportation Program

## Project Timeline

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

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## Project Tasks

### 1. Project Initiation

#### Task 1.1 Project Kick-Off Meeting

- **Brief Task Description:** ITNMontereyCounty staff will invite TAMC staff, Oversight Committee members and any other project stakeholders to attend the kickoff meeting to discuss any grant cycle expectations and project parameters including but not limited to our progress metrics, or any other relevant elements.
- **Project Deliverable:** *Project meeting minutes and completed Grant Funding Agreement.*
- **Expected Completion Date:** *May - July 2023*

### Task 1.2 Release Job Posting for Drivers

- **Brief Task Description:** *Complete recruitment process for bilingual drivers with outstanding customer services skills, clean background, and desire to work in rural communities.*
- **Project Deliverable:** *Job listings posted; Resumes; Completed background checks*
- **Expected Completion Date:** *July-Dec. 2023 ; Ongoing as needed*

### Task 1.3 Project Monitoring

- **Brief Task Description:** *Continued data collection and analysis of both affiliate and rural community projects to ensure projected outcomes and financial stability are being met.*
- **Project Deliverable:** *Ensuring accurate data and submission of Quarterly project reports.*
- **Expected Completion Date:** *Provided quarterly unless otherwise necessary.*

## **2. Public Outreach & Marketing**

### Task 2.1 Collaborative Outreach

- **Brief Task Description:** *Expand ITN Monterey County's presence in rural communities by attending community events and workshops in partnership with Alliance on Aging (AoA) throughout the county. Participate in relevant countywide nonprofit activities such as monthly socials; weekly farmers' markets; public forums; etc.*
- **Project Deliverable:** *Increased program awareness; fostering connections with rural residents; collaboration with key community stakeholders and nonprofit partners.*
- **Expected Completion Date:** *Ongoing throughout Cycle 3 funding*

### Task 2.2 Community Representation

- **Brief Task Description:** *Participate in quarterly meetings of Monterey County's Aging & Disability Resource Connections Committee; bi-monthly meetings of the Area Agency on Aging Executive and Legislative & Advocacy Committees and Monterey Salinas Transits' (MST) Mobility Advisory Council.*
- **Project Deliverable:** *Community awareness and collaborative partnerships; Meeting notes; Increased transportation program knowledge among non-transportation committee members*
- **Expected Completion Date:** *Ongoing throughout cycle 3 funding*

## Task 2.2 Community Safety Presentations

- **Brief Task Description:** *Coordinate community “Age Well” presentations with California Highway Patrol, AoA, MST and other local agencies for drivers over age 55*
- **Project Deliverable:** *Improving public safety; increased awareness of alternative transportation methods within Monterey County; Volunteer driver recruitment opportunity*
- **Expected Completion Date:** *Ongoing throughout cycle 3 funding*

## Task 2.3 Volunteer Recruitment

- **Brief Task Description:** *ITNMontereyCounty will attend/partner with AoA to distribute information at various community meetings and public events to increase awareness of services with a focus on volunteer recruitment and community support. Produce concise marketing ads and distribute in various (paid/earned) platforms with bilingual messaging*
- **Project Deliverable:** *Increased program awareness, volunteer recruitment, marketing materials relevant to rural community needs; collaborate with community partners*
- **Expected Completion Date:** *Ongoing throughout cycle 3 funding*

## 3. Transportation Service -Affiliate

### Task 3.1 Provide Rides upon request

- **Brief Task Description:** *Coordinate dignified transportation for members residing in our current affiliate service area 24/7. Providing reliable transportation for any reason.*
- **Project Deliverable:** *Quarterly rides reports; Customer Satisfaction Surveys*
- **Expected Completion Date:** *Ongoing throughout Cycle 3 funding*

### Task 3.2 Purchase Fleet Electric vehicles

- **Brief Task Description:** *Secure at least 1 electric vehicle for transportation improving affiliate operations where more frequent shorter distance trips are requested.*
- **Project Deliverable:** *Vehicle quotes; Vehicle Maintenance plan*
- **Expected Completion Date:** *October- December 2024*

## 4. Transportation Service - ValleyLine & Northline (Rural)

#### Task 4.1 Provide Rides for Medical, Grocery & Pharmacy needs

- **Brief Task Description:** *Schedule and deliver transportation Monday - Friday from 7 am - 7pm in rural regions to improve accessibility to affordable and reliable transportation.*
- **Project Deliverable:** *Quarterly rides reports; Customer Satisfaction Surveys*
- **Expected Completion Date:** *Ongoing throughout cycle 3 funding*

#### Task 4.2 Project Promotion & Volunteer Recruitment

- **Brief Task Description:** *Coordinate with civic and community partners to disseminate information 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, Bilingual marketing materials and ads*
- **Expected Completion Date:** *Ongoing throughout cycle 3 funding*

#### Task 4.3 Expansion Feasibility

- **Brief Task Description:** *Participate in collaborative evaluation of community resources and volunteer support to allow for travel beyond essential needs; areas of need south of Soledad and on the Big Sur Coastline. Pursue regional sponsorships or corporate "Ride Service" contracts to ensure project sustainability.*
- **Project Deliverable:** *Expanded Service area; Private/Corporate service contracts*
- **Expected Completion Date:** *December 2023-2024*

### 5. Fiscal Management

#### Task 5.1 Financial Review

- **Brief Task Description:** *Review all financial reports and ensuring budgetary controls*
- **Project Deliverable:** *Quarterly Financial reports; Annual tax filings*
- **Expected Completion Date:** *Quarterly throughout cycle 3 funding*

#### Task 5.2 Quarterly invoicing & progress reports

- **Brief Task Description:** *Staff will compile expense documents and provide progress stats*
- **Project Deliverable:** *Invoice documents; Rides software data reports*
- **Expected Completion Date:** *Quarterly throughout cycle 3 funding*

### Task 5.3 Annual reports

- **Brief Task Description:** *Reporting on project results on the previous years achievements or barriers to meeting expected goals for both rural and affiliate service areas.*
- **Project Deliverable:** *Annual report; achieved goals and/or pending progress; rider statistics.*
- **Expected Completion Date:** *Annually throughout cycle 3 funding*



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November 29, 2022

Mr. Aaron Hernandez, Program Coordinator  
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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 continuing our partnership with Independent Transportation Network of Monterey County (ITN) and the iTN Country project. We are proud to be partners in this National Pilot and to have been part of driving the launch of the two new rural projects the ValleyLine and NorthLine. We have been fortunate to have a dynamic steering committee in both South and North County which has provided valuable input and guidance as we develop the model. Alliance on Aging will continue its work with ITN and the iTN Country project in order help grow these new models by recruiting volunteers and promoting the service.

In the next cycle we will use this model to work with the communities of seniors and disabled individuals in Carmel Valley and Big Sur in order to identify service gaps and possible solutions. ITN will be an important partner as we explore transportation options for the under-served in this part of the county. AOA will be working with seniors to assist them with the enrollment process in ITN and iTN Country which can be a barrier for many.

We look forward to continuing to grow our partnership with TAMC and ITN and iTN Country 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).

Teresa Sullivan  
Executive Director

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