

November 30, 2017

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Virginia Murillo, Program Coordinator
Transportation Agency for Monterey County
55 B Plaza Circle
Salinas, CA 93901

Dear Ms. Murillo,

Thank you and the Transportation Agency for Monterey County making senior transportation an important issue in Monterey County. To date, ITN *Monterey County* has provided more than 37,000 rides, grown Salinas membership to 20%, and increase overall membership by 16% in the last year. ITN *Monterey County* is the only nonprofit whose sole mission is to provide transportation for seniors in Monterey County. With this in mind, we respectfully request \$945,750 from Transportation Agency for Monterey County's Measure X funds.

Monika Howell recently shared, "The service ITN provides is truly invaluable, especially for those of us who cannot drive any more. My husband is 93 and I am 81. Since we live on a fixed income we find taking taxis prohibitively expensive. Frequent visits to doctors, and other necessary errands, can become very problematic. The transportation provided by ITN is very much appreciated! The drivers are invariably punctual, friendly, helpful, and courteous. We are very grateful to them and to the entire organization."

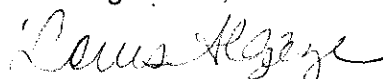
This is a typical response from riders about the impact ITN *Monterey County* is making in their lives. ITN *Monterey County* understands that it is not just the quantity of life that counts, but also the quality. This is why our agency's service is offered 24 hours a day, 7 days a week, without restriction as to the purpose of the ride.

The goals for ITN Monterey County over the next three years are:

1. Continue to efficiently and effectively manage the growth of service needs on the Monterey Peninsula and Salinas.
2. Increase low-income services to seniors within Monterey County.
3. Expand or build on existing partnerships with Monterey-Salinas Transit and other providers of services to our senior and disabled community.

We believe these goals are in strong alignment with the goals of the Senior and Disabled Mobility component of Measure X. Thank you for the consideration of this proposal.

With gratitude,


Louis Algaze
Chairman of the Board

Measure X - Senior & Disabled Transportation Services Program Application

Organization: ITN <i>Monterey County</i>	Date Submitted: December 1, 2017
Project Title: Dignified Transportation of Seniors and Visually Impaired Adults	Brief Project Summary: Provide individualized transportation for seniors and visually impaired adults on a daily basis.
Total Project Cost: \$1,611,768	Funds Requested: \$945,750

Required Contents

Applications are due via email to **Virginia Murillo**, program coordinator, (virginia@tamcmonterey.org) on **December 1, 2017 at 12:00 P.M. PST**. The application must be submitted in a PDF format and include:

- Signed cover letter
- Completed application sections 1-4
- Project implementation timeline **See attachment 2**
- Project budget **See attachment 3**

Additional information such as letters or support, testimonials, maps, photographs and additional information about the organization is not required, but if included should be limited to ten (10) pages.

Please see attachment 1

1. Applicant Information

Score Criteria #1: Applicant Experience (20 points)

Is the applicant a 501(c)(3) tax exempt organization?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
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 fiscal sponsor may be a 501(c)(3) organization. The applicant must complete the following information about the fiscal sponsor.	
Fiscal Sponsor or Applicant Information:	
Name	ITN <i>MontereyCounty</i>
Address	947D Blanco Circle, Salinas, CA 93906
Tax ID #	45-3745255
Contact Name	Aimee Cuda
Telephone Number	831-233-3447
Email Address	aimee.cuda@itnmontereycounty.org
Fax Number	831-998-8393
Organization Year Established	2011
Years Operating in Monterey County	6
Organization Mission Statement	
ITN <i>MontereyCounty</i> 's mission is to provide a community supported, reasonably priced, and customer oriented dignified transportation service for seniors and adults with visual impairment, maintaining independence by allowing individuals to stay connected to family, friends, community, and the local economy.	



Description of Organization: Describe your organization’s scope of services, communities served, experience serving seniors and/or people with disabilities. Describe your organization’s experience providing or coordinating transportation services for seniors and/or people with disabilities.

Independent Transportation Network Monterey County (ITN*MontereyCounty*) is a 501(c)(3) nonprofit organization that provides dignified transportation to seniors and visually-impaired adults age 18 and over. Established in 2011, ITN*MontereyCounty* has provided 7,407 rides in 2016, over 37,000 rides since inception, and continues to provide rides, throughout the Monterey Peninsula area, the city of Salinas, along the Highway 68 corridor, mid-Carmel Valley, and Carmel Highlands.

We are the only nonprofit organization in the area that provides arm-through-arm and door-through-door transportation, 24 hours a day, 7 days a week, for any reason. We deliver this vital service through a network of volunteer and part-time paid drivers who use their own vehicle to provide the rides.

ITN*MontereyCounty* 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 was not meeting the needs of an aging population. She formed *ITN* in 1995; it became a national organization in 2004. ITN*MontereyCounty* is one of fourteen affiliates that operate in the United States; we are the only ITN in California.

Everyone who uses the service becomes a member of the organization. They may ride as frequently as desired 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 ITN trips are voluntarily scheduled in advance, and most riders are pleased to share their ride. Riders use services for a variety of reasons to include: medical (36%), shopping (23%), recreation (21%), social occasions (10%), work/volunteerism (7%), and worship (3%).

ITN*MontereyCounty* is a membership organization. This allows the ITN*MontereyCounty* team to know and understand every member and their individual needs, ensuring personalized service is provided and appropriate emergency information is available for each rider. Each member opens a Personal Transportation Account, which is debited to pay for their rides. No cash is handled during the trip and tipping is not allowed. This keeps members and drivers safe from the risk of misunderstandings over finances. 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. Measure X funding will allow us to expand the scholarship program to reach more low income seniors.

ITN*MontereyCounty* also has a CarTrade™ for ride credit program allowing people to donate a vehicle they no longer drive. ITN*MontereyCounty* serves as a vehicle sales broker selling the car and applying the proceeds to the donor’s personal transportation account, another person’s personal transportation account, or as a donation to the low-income program.

Our proprietary software program, ITN RIDES, tracks member characteristics that help us tailor our service to meet their special needs: additional load time, specialized 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. Drivers are then informed of a member’s needs, along with their ride assignment, to serve each individual appropriately. For example, if a person is visually impaired, the driver is prepared to provide assistance specifically to the members visual needs. Additionally, if a driver arrives for a member and the member does not answer, drivers notify dispatchers immediately and every effort is made to locate the member. If the member is not located, emergency contacts are reached, thus providing peace of mind for members and their families.

Number of Employees	9
Number of Volunteers	38

Board of Directors: Describe the composition of your Board of Directors.

- Louis Algaze, Chairman, lives in Monterey, Director of Technology and Media Groups at Center for Homeland Defense and Security
- Gilbert F. Craig, Jr. (Jeff), Secretary, lives in Pebble Beach, Retired Insurance Agent
- Fernando De Paolis, lives in Seaside, Professor MIIIS
- Edward Lomboy, CPA, Treasurer, lives in Marina, Certified Public Account
- Bob Johnson, lives in Pacific Grove, Member Rider
- Todd Muck, Vice-Chair, lives in Carmel, Deputy Executive Director at Transportation Agency for Monterey County
- Jill Sheffield, lives in Carmel, President/CEO of The Carmel Foundation (Retired)
- Monique LeBlanc, lives in Marina, Branch Manager for Wells Fargo
- Jeff Lamb, lives in Salinas, Business Owner

2. Project Description and Project Implementation Timeline

- **Score Criteria #2: Project Feasibility and Readiness (20 points)**

Project Name	Dignified Transportation for Seniors
Funding Request Amount	\$300,000 year one, \$315,000 year two, \$330,750 year three
Other Funding Sources Allocated to this Project	\$211,266.85; \$221,830.19; \$232,921.70
Total Project Cost	\$511,266.85; \$536,830.19; \$563,671.70
Funding Request Type	<input type="checkbox"/> One-time request <input checked="" type="checkbox"/> Multi-year request
If multi-year, which fiscal years is this funding request for?	<input checked="" type="checkbox"/> 2017/18 <input checked="" type="checkbox"/> 2018/19 <input checked="" type="checkbox"/> 2019/20
Project Type	<input type="checkbox"/> Capital <input checked="" type="checkbox"/> Operating

Brief Project Description: (100 words max)

ITN *Monterey County* will continue to provide transportation for seniors 24-hours a day, seven days a week, every day of the year. Rides given will be for any purpose with a focus on quality of life. Emphasis will be placed on continuing to grow members and volunteers from Salinas and on nurturing and growing partnerships that will allow ITN *Monterey County* to expand providing rides into currently unserved areas of the county. Funds from Measure X will allow ITN *Monterey County* to expand low-income offerings, as well.

Project Area Served: Describe the communities that will be served by the project.

Communities Served: Describe the communities that will benefit from this project. Describe the percentage of seniors and/or people with disabilities that are eligible to benefit or will be served.

ITN *Monterey County* serves all of Salinas, parts of Castroville, limited areas of Prunedale, Highway 68 Corridor, Marina, Seaside, Sand City, Del Rey Oaks, Monterey, Pacific Grove, Pebble Beach, Carmel, Carmel Highland, and Carmel Valley to Mid-Valley. This service area is residence to 68% of all seniors over the age of 60 in Monterey County. As ITN *Monterey County* is able to adequately meet the existing need of these communities, expansion into rural areas of the County can be explored.

Measure X Project Goals: Indicate which of the Measure X program goals the project will address.

- Give seniors more transportation options
- Support independent travel by people with disabilities
- Provide safer and more reliable transportation services for seniors and/or people with disabilities

Project Implementation Timeline

Develop an implementation timeline that identifies key tasks, milestones and corresponding due dates. Include this as an attachment to the application.

3. Project Benefits and Communities Served

- Score Criteria #3: Project Need and Relative Level of Urgency (20 points)
- Score Criteria #4: Geographic Equity (15 points)

Project Need (200 words max)

"Access to transportation is key to support the health and well-being of older adults and ensure their ability to age in place in the community. Yet access to adequate, accessible transportation is a major challenge. The number one reason older adults call the national toll-free Eldercare Locator hotline is for transportation options." ~National Association of Area Agencies on Aging.

This national problem is also a local problem within Monterey County. It is estimated that by 2030, seniors over the age of 60 will comprise 24% of Monterey County. Monterey County Area Agency on Aging had more than 16,000 calls and walk-ins in 2016. Transportation was one of the top four requests in 2016. The need is apparent.

Despite tremendous fundraising efforts, the rising costs of salaries and workers compensation benefits for employees has made it extremely challenging for this small non-profit to keep rates reasonable while meeting the community demands and recruiting and onboarding competent drivers. Competitive salaries are necessary to obtain quality drivers and special funding is necessary to make programs accessible to low-income individuals.

Project Goals (200 words max)

ITN *Monterey County* set the following goals for 2017-2018

1. Total rides provided will surpass 45,000 rides
2. 100 new members will be added.
3. Salinas riders will grow by 25% of the total membership
4. 12 new volunteers will be added with 25% coming from Salinas

Communities Served: Describe the communities that will benefit from this project. Describe the percentage of seniors and/or people with disabilities that are eligible to benefit or will be served.

ITN *Monterey County* will continue to serve all of Salinas, parts of Castroville, limited areas of Prunedale, Highway 68 Corridor, Marina, Seaside, Sand City, Del Rey Oaks, Monterey, Pacific Grove, Pebble Beach, Carmel, Carmel Highland, and Carmel Valley to Mid-Valley. This service area is residence to 68% of all seniors over the age of 60 in Monterey County. As ITN *Monterey County* is able to adequately meet the existing need of these communities, expansion into rural areas of the County can be explored.

100% of people over the age of 60 are eligible for services with ITN *Monterey County*. Additionally 100% of all adults over the age of 18 with visual

impairments are eligible for services. Individuals under the age of 60 who are receiving Medicare for disabilities limiting their ability to drive are also eligible for services.

Project Scope of Work: Describe the main tasks of the project.

The activities of the organization include:

- All aspects of dispatching
 - Entering in memberships, financial transactions, and drivers into the ITN RIDES system
 - Scheduling rides
 - Managing crises and reaching out to emergency contacts when necessary
- Providing transportation
 - Arm-through-arm and door-through-door
 - Helping with packages
 - Managing crises when they arise
 - Providing hourly services and customer accompaniment when necessary
- Securing drivers (paid and volunteer)
 - Community outreach
 - Marketing
 - Background clearance
 - Training
- Building community awareness
 - Safe driving instruction for seniors
 - Program options for the varying needs of people using services
- Research and partnerships
 - Understanding the changing needs of seniors
 - Discovering new ways to expand to rural areas
 - Looking for partnering agencies that have like-minded missions

Expected Project Outcomes: *Example – Service hours will expand by ###% to serve ## more passengers per month/year.*

The expected outcome is that members have a resource that helps them access their basic needs of food, shelter, and medical care but also connects them to the local economy, friends and family, social events, and fitness activities. ITN *Monterey County* helps seniors and visually impaired adults age in place. Benefits are best summed up by a rider: “As a resident senior with impaired vision and other physical challenges, I deeply appreciate the existence of ITN *Monterey County*, operating locally and available for my needs. ITN is very helpful for transportation to medical appointments and other essential care. Being able to get around and continue preferred activities in a safe and helpful manner is very important in my daily life.”

Project Evaluation: Describe how you will measure the project outcomes and track your progress towards achieving the project goals.

ITN *Rides*, our proprietary software program that is provided and maintained by ITN *America*, allows us to

accurately track our monthly progress. We report monthly number of rides, number of volunteers, unique riders and volunteers (actual users and providers during a given month), percentage of rides delivered by volunteers vs. paid drivers, new members, lost members, and occupied vs. unoccupied miles. ITNRides can track increases in membership among specific groups and geographic areas. Changes to membership and marketing materials can be seen in print and on the web.

4. Project Budget

- **Score Criteria # 5: Cost Effectiveness (15 points)**

Develop a project budget that identifies the cost of each key task, with capital and operating costs called out separately. If this funding request will leverage other funds, identify which phases of the project will be funded by each funding source.

See attachment 3

What our riders have to say about ITN *MontereyCounty*

- ITN is important to me because it gives me the independence of transportation safely and promptly when I need it. ~Carol Neville
- I like using ITN because of the years it has provided my partner me transportation to critically important appointments as well as to the hairdresser or lunch dates. Life here would not be so wonderful without them! ~Anonymous
- What could be better than having a positive, friendly driver pick you up, on time, at your home and then return you the same way? I'm not sure I would want to drive again. ~Toddy Olow
- I use ITN mostly for doctor's appointments. Occasionally for rides to church services when my family is busy and can't take me. ~Bernice Hamana
- ITN is important to me because I've sold my car and so far the rides are working out well. Thank you. ~Betty Paul
- I recently gave up driving because of health reasons. ITN has been of great help. They always get me to my appointments on time. The drivers are friendly and helpful. It is like having a friend pick you up and take you places. ~Katherine Sherer
- I like using ITN because the service is very dependable; the drivers couldn't be nicer! The drivers seem to care about my safety. Staff always lets me know about changes in my scheduling. I can't think of a better way to get around the city. ~Joan Blackman

ITN Monterey County Three Year Budget

INCOME	17-18 Budget	18-19 Budget	19-20 Budget
Operating Income			
Paid Driver Fares	\$ 49,737.00	\$ 52,223.85	\$ 54,835.04
Volunteer Driver Fares	\$ 65,306.00	\$ 68,571.30	\$ 71,999.87
Membership Dues	\$ 20,830.00	\$ 21,871.50	\$ 22,965.08
Total Operating Income	\$ 135,873.00	\$ 142,666.65	\$ 149,799.98
Non-Operating Income			
Contribution Income	\$ 40,291.00	\$ 42,305.55	\$ 44,420.83
Community Foundation	\$ 20,000.00	\$ 21,000.00	\$ 22,050.00
Monterey Peninsula Foundation	\$ 15,000.00	\$ 15,750.00	\$ 16,537.50
Upjohn California Fund	\$ 2,000.00	\$ 2,100.00	\$ 2,205.00
Yellow Brick Road	\$ 3,000.00	\$ 3,150.00	\$ 3,307.50
Grants not yet received in 2017-2018	\$ 50,000.00	\$ 52,500.00	\$ 55,125.00
Measure X	\$ 300,000.00	\$ 315,000.00	\$ 330,750.00
Total Non-Operating Income	\$ 430,291.00	\$ 451,805.55	\$ 474,395.83
Total INCOME	\$ 566,164.00	\$ 594,472.20	\$ 624,195.81

Funds in yellow may or may not be received and are only an estimate

EXPENSES			
Operating Expenses			
Low income rides	\$ 50,000.00	\$ 52,500.00	\$ 55,125.00
Mileage reimbursement, and veh. exp.	\$ 25,000.00	\$ 26,250.00	\$ 27,562.50
Communications	\$ 5,500.00	\$ 5,775.00	\$ 6,063.75
Driver Wages	\$ 79,000.00	\$ 82,950.00	\$ 87,097.50
Dispatch Wages	\$ 67,000.00	\$ 70,350.00	\$ 73,867.50
Office Manager/bookkeeper	\$ 25,000.00	\$ 26,250.00	\$ 27,562.50
Executive Director	\$ 85,000.00	\$ 89,250.00	\$ 93,712.50
Workers Comp	\$ 42,000.00	\$ 44,100.00	\$ 46,305.00
Medical insurance	\$ 8,400.00	\$ 8,820.00	\$ 9,261.00
Payroll taxes	\$ 27,000.00	\$ 28,350.00	\$ 29,767.50
Finance Charges	\$ 695.25	\$ 730.01	\$ 766.51
Postage	\$ 2,000.00	\$ 2,100.00	\$ 2,205.00
Printing	\$ 1,200.00	\$ 1,260.00	\$ 1,323.00
Office Supplies	\$ 6,000.00	\$ 6,300.00	\$ 6,615.00
Equipment	\$ 700.00	\$ 735.00	\$ 771.75
Staff expenses	\$ 2,680.06	\$ 2,814.06	\$ 2,954.77
Professional Fees	\$ 9,000.00	\$ 9,450.00	\$ 9,922.50
Insurance	\$ 3,538.05	\$ 3,714.95	\$ 3,900.70
Rent	\$ 6,420.00	\$ 6,741.00	\$ 7,078.05
Minor capital	\$ 1,000.00	\$ 1,050.00	\$ 1,102.50
Affiliation	\$ 10,300.00	\$ 10,815.00	\$ 11,355.75
Marketing	\$ 30,000.00	\$ 31,500.00	\$ 33,075.00
Volunteer expenses	\$ 1,500.00	\$ 1,575.00	\$ 1,653.75
Total Operating Expenses	\$ 488,933.36	\$ 513,380.03	\$ 539,049.03
Volunteer Reimbursements Cash/Credit			
Occupied Mileage (cash)	\$ 9,344.16	\$ 9,811.37	\$ 10,301.94
Unoccupied Mileage (credits)	\$ 12,989.33	\$ 13,638.80	\$ 14,320.74
Total Non-Recurring Expenses	\$ 22,333.49	\$ 23,450.16	\$ 24,622.67
Total EXPENSES	\$ 511,266.85	\$ 536,830.19	\$ 563,671.70
Net Income	\$ 54,897.15	\$ 57,642.01	\$ 60,524.11

NET INCOME \$ 54,897.15 \$ 57,642.01 \$ 60,524.11

Please see comments above regarding income.