February 19, 2020

To: Transportation Agency for Monterey County
Attn: Stefania Castillo, Transportation Planner

Re: Measure X Annual Report from ITNMontereyCounty

Summary of Activities

ITNMontereyCounty provides 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 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 one-third of what it costs ITNMontereyCounty to deliver the ride. There is a low-income fee structure for seniors who cannot afford the regular service and some rides are provided free-of-charge based on scholarship programs offered by sponsoring agencies. In 2019, Regeneron continued providing 100% scholarships for trips to vision appointments. Additionally, we expanded scholarships for low-income members through the ITN Road Scholarship program to include a ride for any reason covering $7.50, supporting more than just medical and grocery store needs as in previous years.

The direct service outcome is that members have an affordable 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. ITNMontereyCounty helps seniors and visually impaired adults age in place. Benefits are best summed up by a rider: “Thank you for all your help at this time of my needs. Your drivers are the best, and very helpful and so are all of the office staff at ITN” ~ E. Aremia Member Rider

Beyond providing dignified rides ITNMontereyCounty finds additional opportunities to improve public safety not only through our ‘Age Well Drive Smart’ community presentations provided in partnership with CHP and CA DMV ombudsmen program, but assisting our membership as well. “I am a very satisfied car donor to ITNMontereyCounty. I donated my car in October 2019, and I am very pleased with how the entire transaction was handled.” ~ C. Guarino, Member Rider

We gladly assisted six members in the transactional process to transform their vehicle into an asset they utilize in ride credits with our service, transitioning to the passenger seat with ease. Funding from Measure X was significant; allowing ITNMontereyCounty to keep operational stability, continuing exploration of expansions, and providing these vital needed services.
Work completed in 2019

*ITNMontereyCounty* currently relies on 43 volunteer drivers with six on-call drivers providing back-up support when volunteer drivers cannot be matched to certain transportation needs. In the last year, *ITNMontereyCounty* provided 9,370 rides to over 340 members with an increase from providing a quarterly average of 630 rides in 2018, to more than 820 rides throughout 2019.

We celebrated *ITNMontereyCounty*’s milestone “50,000 Ride” event in August 2019, where a reenactment of the ride delivered in May with volunteer Tomi Nemes and Joan Blackman in a red convertible was held at BMW of Monterey. Other accomplishments for 2019 include:

1. Expanded our “Volunteer’s Needed” campaign to include a TV commercial. Additional marketing efforts for the celebration of our “50,000 Ride” event included radio coverage.
2. We added 201 new members, which does not include Aspire sub-member riders.
3. A total of 9 volunteers were recruited, 4 of whom were previous supporters, with 66% of them coming from Salinas or South County (Greenfield).
4. Hiring and training: Attended ITNAmerica Affiliate Retreat in October, hired a project manager/Admin assistant to improve office efficiencies, and two bilingual drivers.
5. Expanded partnerships which included providing resource materials to Alliance on Aging providing outreach to seniors particularly those living in rural Monterey County.
6. Participated in nine "Age Well Drive Smart" community presentations spanning from Salinas to Pebble Beach. The Executive Director continues to serve on the Mobility Advisory Council for MST, and Area's Alliance on Aging council in addition to attending community collaborative group meetings such as MCCVA, Senior Round-table, Areas Agency on Aging council and leads the Legislative Action sub-committee.
7. Executed three Rotary club and two Lion's club presentations where information about *ITNMontereyCounty* services and our volunteer needs were shared.
8. Expanded Ride Service are for Aspire Health Plan riders to include all rural areas within Monterey County, resulting in over a dozen ride requests for medical appointments.
9. Assisted MST, Alliance on Aging, Central Coast Senior Services, and Monterey County Fair with increasing exposure for attendance of over 1100 to Senior Day & Vet Connect held in August.

**Expenses to date**

<table>
<thead>
<tr>
<th>Year – 2019</th>
<th>Funding Approved</th>
<th>Funding Received</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>detailed expenses in P&amp; L</em></td>
<td>$684,555.91</td>
<td>$622,810.82</td>
</tr>
</tbody>
</table>
Communities Served

ITNMontereyCounty Transports Members Living in These Zipcodes

- 93921 - Carmel-by-the-Sea
- 93940 - Monterey
- 93950 - Pacific Grove
- 93953 - Pebble Beach
- 93955 - Seaside
- 93901 - South Salinas
- 93905 - East Salinas
- 93906 - North Salinas
- 93907 - West Salinas
- 93908 - *Toro Park
- 93923 - Carmel Valley
- 93924 - *Carmel Valley
- 93933 - Marina
- 95012 - Castroville

*partial

Numbers Served
ITNMontereyCounty has delivered over 55,260 rides with volunteers providing 37.9% of them.

Special Needs (as of 12/31/19)

- 2.2% Alzheimer’s dementia
- 1.6% anxiety disorder
- 1.3% bladder disorder
- 1.4% blind
- 20.5% cane
- 2.32% deaf
- 13.77% driver assistance required
- 1.5% full size vehicle required
- 9.3% no high vehicle
- 1.2% personal assistance
- 0.0% service animal
- 2.7% trunk required
- 8.3% visual impairment
- 13.7% walker
- 2.8% wheelchair

Note: Over 52% of our current membership requires some form of mobility assistance.
Work remaining in 2020

The only goal that was just shy of being successfully met was our volunteer recruitment efforts. This is a large scale issue with so many service based organizations needing to rely upon community support. All low and no cost methods of volunteer recruitment are being exhausted with attendance at health and wellness fairs, outreach to churches, attendance at community classes such as Age Well, Drive Smart, connections to volunteer websites, and speaking engagements to area civic groups such as Kiwanis, Rotary, and Lions clubs. Additionally, we plan to partner with numerous senior community partners throughout 2020 distributing materials on preparing for various disasters, leveraging a larger network of potential volunteer supporters.

ITNMontereyCounty expects to complete the following accomplishments by June 2020:
1. Total rides provided will surpass 58,500 rides
2. 130 new members will be added with 15% of them being residents in Salinas or rural areas
3. Recruit and train 5 new volunteers with 25% coming from Salinas
4. Expand public safety awareness efforts to include disaster preparedness/readiness workshops*
5. Pursue additional Ride Service contracts with locally operated hospitals and medical offices.

*Note: This is in collaboration with local CERV community disaster preparedness grant funds.

Pictures – See attached marketing and event materials produced throughout 2019.

Respectfully,

Jessica McKillip
Executive Director
We just celebrated our 50,000th ride

Make a difference in someone’s life and become an ITN driver

Help us reach 100,000 rides

Volunteer opportunities to provide community based, community supported quality transportation services for seniors and visually impaired adults

iTN Monterey County
Dignified transportation for seniors

831.233.3447
info@itnmontereycounty.org
www.itnmontereycounty.org
Activities Update– December 2019

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Rides</td>
<td>781</td>
<td>799</td>
<td>766</td>
<td>924</td>
<td>869</td>
<td>878</td>
<td>772</td>
<td>730</td>
<td>795</td>
<td>733</td>
<td>775</td>
<td>657</td>
<td>672</td>
</tr>
<tr>
<td>Unique Riders</td>
<td>110</td>
<td>118</td>
<td>122</td>
<td>133</td>
<td>137</td>
<td>127</td>
<td>128</td>
<td>128</td>
<td>128</td>
<td>120</td>
<td>123</td>
<td>119</td>
<td>122</td>
</tr>
<tr>
<td>Volunteer Driver Coverage</td>
<td>35%</td>
<td>36%</td>
<td>35%</td>
<td>36%</td>
<td>40%</td>
<td>38%</td>
<td>40%</td>
<td>39%</td>
<td>35%</td>
<td>43%</td>
<td>35%</td>
<td>35%</td>
<td>42%</td>
</tr>
<tr>
<td>Unique Drivers/ Total</td>
<td>22/35</td>
<td>24/36</td>
<td>28/35</td>
<td>27/36</td>
<td>29/40</td>
<td>27/37</td>
<td>29/39</td>
<td>31/39</td>
<td>34/40</td>
<td>27/40</td>
<td>26/40</td>
<td>29/41</td>
<td></td>
</tr>
<tr>
<td>Unoccupied/ Occupied Mileage</td>
<td>1.47</td>
<td>1.34</td>
<td>1.43</td>
<td>1.35</td>
<td>1.36</td>
<td>1.30</td>
<td>1.29</td>
<td>1.24</td>
<td>1.17</td>
<td>1.31</td>
<td>1.47</td>
<td>1.54</td>
<td>3.15</td>
</tr>
<tr>
<td>Total Members</td>
<td>421</td>
<td>427</td>
<td>436</td>
<td>453</td>
<td>464</td>
<td>468</td>
<td>477</td>
<td>485</td>
<td>494</td>
<td>492</td>
<td>500</td>
<td>495</td>
<td>508</td>
</tr>
<tr>
<td>New Volunteers</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Rides by Board Members/ Spouses</td>
<td>65/292 22.2%</td>
<td>58/332 17.5%</td>
<td>56/265 21%</td>
<td>73/336 21.7%</td>
<td>62/347 17.8%</td>
<td>65/332 19.5%</td>
<td>52/292 17.8%</td>
<td>50/285 17.5%</td>
<td>92/282 32%</td>
<td>103/317 32.5%</td>
<td>62/273 22.7%</td>
<td>66/232 28.4%</td>
<td>102/281 36%</td>
</tr>
</tbody>
</table>
**Director’s Activity Report for December 2019**

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>December 3rd</td>
<td>AWDS workshop @Merrill Gardens</td>
<td>December 13th</td>
<td>ITN Staff holiday party</td>
</tr>
<tr>
<td></td>
<td>AAA- L&amp;A meeting</td>
<td>December 17th</td>
<td>KION – Commercial production</td>
</tr>
<tr>
<td>December 5th</td>
<td>Women in Transit presentation- MST &amp; AAA – Executive Meeting</td>
<td>December 18th</td>
<td>Investor mtg @ITN office &amp; Call with ITNAmerica re: ITNCountry model</td>
</tr>
<tr>
<td>December 8th</td>
<td>MCCVA Monthly mtg. @MC Foodbank</td>
<td>December 19th</td>
<td>AAA – Full council meeting &amp; potluck</td>
</tr>
<tr>
<td>December 9th</td>
<td>M. Pena car donation inspection</td>
<td>December 22nd</td>
<td>Measure X –committee meeting</td>
</tr>
<tr>
<td>December 11th</td>
<td>CERV – Contract &amp; grantee meeting</td>
<td>December 31st</td>
<td>DMV – VW registration &amp; WF deposits</td>
</tr>
<tr>
<td>December 12th</td>
<td>ITN Board meeting &amp; MeHeen car donor inspection</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Grants:**

1. Dunspaugh Dalton- Request for $5000 submitted 1.4.19 ~ RECEIVED 3.30.19
2. Barnet Segal Charitable Trust – RECEIVED $15,000 April 2019
3. Community Foundation for Monterey County: Submitted $25,000 ~Confirmed & Received 7.8.19
4. Monterey Peninsula Foundation: $15k/ Two year APPROVED & 2nd received 11.2019
5. Wells Fargo: $5,000 requesting, Consider reapplying
6. Harden Foundation: $15,000 – Received Matching $15,000 11.15.19
7. CHOMP: $5,000 Received in March 2019
8. Yellow Brick Road – Requested $4k Submitted 11/8/19 Received $2500 1/2020
9. UpJohn CA Fund ~ Received $2k Oct. 2019
10. CERV California Listos Readiness Fund ~ Confirmed $23,500 (calendar year 2020)
An Exploded Doughnut Chart View of Ride Counts by Ride Purpose Group
(1/1/2019 - 12/31/2019)

<table>
<thead>
<tr>
<th>Ride Purpose Group Description</th>
<th>Ride Count</th>
<th>% (Excluding Home/Return rides)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumer</td>
<td>1388</td>
<td>24.79%</td>
</tr>
<tr>
<td>Education</td>
<td>42</td>
<td>0.75%</td>
</tr>
<tr>
<td>Employment/Volunteering</td>
<td>118</td>
<td>2.11%</td>
</tr>
<tr>
<td>General</td>
<td>28</td>
<td>0.5%</td>
</tr>
<tr>
<td>Home/Return *</td>
<td>4730</td>
<td>45.79%</td>
</tr>
<tr>
<td>Inter-Modal</td>
<td>14</td>
<td>0.25%</td>
</tr>
<tr>
<td>ITN</td>
<td>4</td>
<td>0.07%</td>
</tr>
<tr>
<td>Medical</td>
<td>2472</td>
<td>44.16%</td>
</tr>
<tr>
<td>Professional Services</td>
<td>49</td>
<td>0.88%</td>
</tr>
<tr>
<td>Recreation</td>
<td>300</td>
<td>5.36%</td>
</tr>
<tr>
<td>Religious</td>
<td>561</td>
<td>10.02%</td>
</tr>
<tr>
<td>Social</td>
<td>623</td>
<td>11.13%</td>
</tr>
</tbody>
</table>

Ride Count Totals (including Home/Return Rides) 10329

NOTES:
* Home/Return percentage is a percentage of all rides given.
All other rows within the "%" column excludes the Home/Return ride count.