



# The Giving Common

An Initiative of the Boston Foundation

[www.thegivingcommon.org](http://www.thegivingcommon.org)

## SCM Community Transportation, Inc.



### General Information

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**Website**

[www.scmtransportation.org](http://www.scmtransportation.org)

**Organization Contact**

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**Year of Incorporation**

1983

# Statements & Search Criteria

## **Mission Statement**

SCM promotes the independence of seniors and persons with disabilities through community based transportation. Our friendly, safe and reliable services help people maintain healthy, mobile and connected lives.

## **Background Statement**

\* SCM is one of Greater Boston's oldest and most respected non-profit providers of transportation services for senior citizens and persons with disabilities. Functionally, we operate a fleet of twenty-six cheerful green and white vans that provide 10,000 trips a month to doctors' appointments, grocery shopping, adult day health, meal sites, and beyond. We have more than 3,000 patrons in our catchment communities, which include, but are not exclusive to, our founding cities of Somerville, Cambridge and Medford (SCM). Eighty percent of our riders are low to moderate income, and forty percent have a mobility impairment.

\* On one level, we operate a classic paratransit agency, keeping the tanks filled, fixing transmissions and meeting our neighbors' most critical mobility needs. The access we provide to doctors' appointments, grocery shopping, and adult day health programs make it possible for our riders to live independently in their homes.

\* Transcending our classical operations, however, is an aspiration to become a more nimble, lifestyle-supporting agency. We want to connect individuals to all of the people and activities that foster health and well-being. To that end, we have developed programs that help our riders enjoy the arts, the outdoors, and visits with loved ones.

\* Finally, we have a growing role on the policy landscape, particularly in the field of mobility management. Mobility management introduces advocacy into the transportation equation. Rather than simply providing trips, mobility managers also assist individuals in accessing the full gamut of transportation modes and services available to them. Further, mobility managers focus on convening and coordinating service providers- identifying and managing gaps and overlaps. SCM has received a federal grant that will help us evolve from being a simple provider of trips to being hands-on problem solvers and travel trainers for our clients. We expect to provide thought leadership in this arena.

## **Impact Statement**

1. We secured a multi-year federal grant to launch mobility management services. Our new program, Ways2Go, will connect people to ALL of their transportation options, providing aggregated information, travel training services, and coordination. Our most visionary goal for the next three to five years is to bring mobility management best practices to fruition in Greater Boston. We are pleased to have a multi-agency steering committee that thus far includes the MBTA, the Mass Rehab Commission, and Mystic Valley Elder Services.

2. It has been no small feat just keeping the doors open- providing critical medical, shopping, and adult day health transportation- while fuel prices has climbed 36% over two years and other costs have not slowed. 75% of our revenue comes from government contracts and grants that have been flat or declining for more than a decade. Finding new funding sources for our core services – especially Medical Dial-a-Ride is one of our top challenges.

3. Credit for our derring do goes to talented management and board. This year, we welcome three new board members, adding additional financial, fundraising, and business development know-how. We keep the vans running. We provide 10,000 trips a month our most vulnerable neighbors. AND, we are fixed on attaining a ground-breaking, extraordinary future. Along these lines, the biggest challenge in the near term is to keep our core service vibrant while blazing an innovative new business model.

4. We continue to build a thriving Door2Door to the Arts program. Arts underscores our commitment to supporting complete lifestyles, not just bare minimum transportation. We produce four packed and varied calendars per year, enabling participants to experience the emotional and cognitive benefits of engaging in arts as well as making new connections and friendships. We are elated to add "joy" to our program palette in this unique way. Over the next three years, we hope to complement Arts with Door2Door Outdoors.

## **Needs Statement**

1. New partnerships and fundraising capacity to keep our core services sound- even growing- in the face of increasingly austere government contracts and grants.

2. Additional operations management talent as we roll out Ways2Go and harmonize its services with our current transportation portfolio.

3. Refreshed infrastructure- especially updated software and training to support greater coordination, efficiency and flexibility.

4. Additional financial modeling muscle to support our strategic and business planning.

5. Capital, capital, capital.

## CEO/Executive Director Statement

SCM is a brilliant organization because of:

A. what it is and has been to its riders for almost three decades, and

B. its potential to have dramatic impact during a time of fiscal tumult and policy ferment around a most intractable issue, especially in Massachusetts: transportation.

A. What we are and have been: A top-notch transportation service to thousands of senior citizens and persons with disabilities. A "lifesaver" for those who don't qualify for the RIDE but can't really access public transportation and have run out of favors with friends and neighbors. The difference between living at home and looking after oneself or moving to an institutionalized setting. If you ask any of us, "What's so special about SCM?" the answer has always been "our drivers and our commitment to safety." We are superior at the services we provide. The reason that we are so good at it is because we love to do it.

B. What we are becoming: SCM is uniquely poised to implement best practices in mobility management. Under a mobility management framework, the art of transportation extends beyond providing trips to those who ask for them. The art of transportation becomes connecting people with their destinations, however you can. It means understanding everything that is available and giving that information out. It becomes advocacy on behalf of individuals and coordination across organizations and sectors. From the individual's perspective, this means having a coach and advocate to help you stay connected- by hook or by crook- to everything you value. From the industry's perspective, this means coordination. Much as we see in health care reform, the transportation industry will improve quality and lower costs by focusing less on transactions within silos and more on the outcomes for individuals.

In philanthropic circles, much attention is paid to social innovation. At SCM, we are engaged in social renovation. We're taking a mainframe, classic transportation agency (a provider of trips) and growing it into a thought leader in the field of helping people get where they need to go (provider of answers).

## **Board Chair Statement**

\* As the Chair of the Board of Directors of SCM Transportation, I am continually impressed with how much our organization accomplishes- with our vans, with our minds, and with our hearts. Every single day, we are providing access- to healthcare, nutrition, community life, education and beyond- to seniors and others who have special challenges and cannot easily access public transport. Let's face it: No matter what you need to accomplish, getting somewhere is usually half the game. Providing mobility-with a focus on quality and caring- is what makes me passionate about SCM and its Door2Door transportation services.

\* We all have had friends and relatives who have "needed a lift" from time to time and sometimes on a consistent basis. When it is our own parent and or friend, we ask: are the drivers competent, will they be on time, will my loved one be comfortable and will they be well cared for? I can say, without question, that these are the qualities that set SCM apart and why I stay involved.

\* Like any other organization, we have challenges...especially in these difficult financial times. Our overriding concern is safety and therefore, we need to keep our vehicles updated and improved.

\* This is a costly endeavor. We operate 26 fully equipped paratransit vans and buses providing 10,000 one-way trips every month. We use a lot of gasoline. And tires!

\* Our funding is also a challenge. Eighty percent of our riders are in the low to moderate-income bracket and the numbers of those in need continue to climb. We are in the process of addressing these issues and embarking on a number of entrepreneurial initiatives to create additional revenue sources.

\* Specifically, we have launched a federally-sponsored New Freedom program that hinges on a transportation methodology called mobility management. Within this framework, we transportation providers take a more expansive view of our role. Instead of just setting up infrastructure and providing a certain number of trips, we must also advocate and coordinate on behalf of our riders, connecting them to a full range of options and service providers. Furthermore, we must convene—across sectors – to identify gaps and overlaps and address the barriers that hinder our most vulnerable constituents.

\* We have a committed, innovative management team and board that together will continue to address these issues today and for the future. The staff and board of directors at SCM is not interested in just running a fleet of vans. We want to radically improve the entire transportation landscape.

## Service Categories

Transportation Assistance

Alliances & Advocacy

Arts & Culture

## Geographic Areas Served

Please review online profile for full list of selected areas served.

# Programs

## **Adult Day Health Transportation**

<b>Description</b>	SCM provides transportation to nine area adult day health facilities.
<b>Budget</b>	1,000,000
<b>Category</b>	Human Services, General/Other Transportation Assistance
<b>Population Served</b>	Elderly and/or Disabled, ,
<b>Program Short Term Success</b>	SCM provided 72,544 trips to adult day health facilities in fiscal year 2012.
<b>Program Long term Success</b>	Adult day health services, including transportation, are captive to the priorities and interests of health care policy and public funding via Medicare/ Medicaid. To the extent that these program result in better health outcomes, they will be in high demand, especially as health policy moves towards accountable care.
<b>Program Success Monitored By</b>	Number of safe trips provided.
<b>Examples of Program Success</b>	Safe trips provided.

## Medical Dial-a-Ride

<b>Description</b>	<p>Medical Dial a Ride (DAR) is our most cherished program. With the funding of community and hospital grants, we provide thousands of trips monthly to hospitals and doctors' offices. Central to this service is the caring, door-to-door assistance that we provide each rider. Indeed, in ice, snow or rain, the most treacherous part of a trip is often between one's front door and the awaiting vehicle.</p> <p>DAR is a critical safety net for those who do not qualify for the MBTA's paratransit service, the RIDE, but who cannot easily access public transportation. It relieves participants from depending on friends and neighbors for a lift. It removes the headache and expense of traffic and parking. DAR thus increases the likelihood of getting preventative and follow-up care, and our riders are healthier because we are here. DAR is also our most vulnerable service financially, as our traditional grants and contracts have remained flat or declined over the past decade.</p>
<b>Budget</b>	425,000
<b>Category</b>	Human Services, General/Other Transportation Assistance
<b>Population Served</b>	Elderly and/or Disabled, ,
<b>Program Short Term Success</b>	SCM provided 19,193 trips to medical appointments in fiscal year 2012.
<b>Program Long term Success</b>	Transportation is vital to the health care equation.
<b>Program Success Monitored By</b>	number of trips safely delivered.
<b>Examples of Program Success</b>	Access to health care- especially preventative care and follow-up care after procedures- is an important key to long-term well-being and the management of health care expenses

## Nutritional Shopping

<b>Description</b>	<p>SCM operates twelve shopping shuttles weekly. We get our riders to and from the grocery store, and we assist them with up to five bags of groceries each.</p>
<b>Budget</b>	80,000
<b>Category</b>	Human Services, General/Other Transportation Assistance
<b>Population Served</b>	Elderly and/or Disabled, ,
<b>Program Short Term Success</b>	Participants select and purchase their own food.
<b>Program Long term Success</b>	The ability to shop for one's food is an important part of maintaining an independent lifestyle.
<b>Program Success Monitored By</b>	Number of safe trips provided.
<b>Examples of Program Success</b>	Our riders report that they could not live on their own if they did not have SCM to assist them with their shopping.

## Door2Door to the Arts

<b>Description</b>	<i>Door2Door to the Arts</i> facilitates access to cultural and arts activities primarily for senior citizens, but also for persons with disabilities. <i>Arts</i> riders enjoy the well-studied cognitive and mental health benefits that come with access to cultural engagement. Without this program, most of our participants would not otherwise have access to the arts.
<b>Budget</b>	95,000
<b>Category</b>	Arts, Culture & Humanities, General/Other Arts, Culture & Humanities, General/Other
<b>Population Served</b>	Elderly and/or Disabled, ,
<b>Program Short Term Success</b>	We are especially proud of our <i>Arts</i> program outcomes, which we systematically measure. At the end of our 2011 program year, 44% of participants surveyed reported that <i>Door2Door to the Arts</i> had allowed them to form new connections and friendships. 52% said that they had an increased sense of well-being. And 92% said they experienced happiness through participation in our program.
<b>Program Long term Success</b>	The Arts program will provide steady, uncompromised access to cultural and arts activities for our riders.
<b>Program Success Monitored By</b>	We developed program management tools that systematically outcomes: learning, action, and condition.
<b>Examples of Program Success</b>	Arts riders report that they have access to activities that they would otherwise not be able to attend safely. In the words of one of our riders, "The program is wonderful. It opened up the world of arts to me again... a dream come true." From another, "I want to tell you how glad I am to be picked up at my door and returned home again in very good fashion... how much I appreciate it." And finally, a third, "I need this program, because the cost of tickets is too high and I have no one to take me."



## Ways2Go.

<b>Description</b>	As described throughout this narrative, SCM's new mobility management platform is responding to the growing need for coordination between sectors, agencies and vendors as well as for hands-on skill building and counseling for those who need help with their transportation options.
<b>Budget</b>	500,000
<b>Category</b>	Human Services, General/Other Transportation Assistance
<b>Population Served</b>	Elderly and/or Disabled, Poor, Economically Disadvantaged, Indigent,
<b>Program Short Term Success</b>	<p>Short-term success will be in the continued build-out of our steering committee, so that we have representation across constituencies who have real stakes in mobility outcomes: senior citizens, persons with disabilities, low income, etc. We also need to complete the technical platform.</p> <p>We will measure success in the short term by the quality of outreach we do that results in interest in and enrollment in our travel training/ transportation solutions coordination outcomes.</p>
<b>Program Long term Success</b>	Our mobility management program will result in greater travel independence, both for our immediate constituents (SCM riders) and for those of the other program sponsors, which today include: the MBTA Department of System Wide Accessibility, the Massachusetts Rehabilitation Commission, and Mystic Valley Elder Services. In the travel training and solutions coordination arena, 60% of participants will become comfortable planning trips and taking public transportation on their own. 50% will create transportation strategies that involve multiple transportation modes; for example, the RIDE and a volunteer program. From an agency point of view, we will achieve more efficient and cost effective solutions via improved visibility to all available resources and coordination of those resources from a single platform.
<b>Program Success Monitored By</b>	From a travel training/ solutions coordination perspective, we will monitor success by gathering baseline data for each participant; i.e. how much independent traveling they currently do, how many modes they access, how well they feel connected to their most vital services. We will follow up upon completion and in the months after to ascertain if travel training and solutions coordination did indeed improve mobility outcomes.
<b>Examples of Program Success</b>	This is a new program. We have no outcomes yet.

# Management

## CEO/Executive Director

<b>Executive Director</b>	Ms. Reed Cochran
<b>Term Start</b>	June 2005
<b>Email</b>	rcochran@scmtransportation.org

### **Experience**

Reed Cochran became Executive Director at SCM in June, 2006, after serving one year as Interim Executive Director. Working with SCM's talented and hardworking staff and board of directors, she has renovated the agency's traditional service model, adding an entrepreneurial streak that has diversified both SCM's programs and its revenue streams.

Reed's fortunes at SCM are reflective of a dynamic career spanning sectors, interests and skill sets. She has been a public high school teacher in her home state of Mississippi, a Rotary Scholar in Argentina, and an IT project director and management consultant in Silicon Valley.

Reed studied history as an undergraduate at Brown University. In 2005, she completed an MPA at the Harvard Kennedy School and immediately accepted the Interim Executive Director role at SCM. Although she was new to transportation, Reed learned quickly. She fell in love with SCM's mission, its staff and the people that SCM serves. Beyond the tangible rewards of delivering hundreds of trips to neighbors every day, Reed and SCM thrive on their active participation in the growing social and policy conversations around transportation, human services, and the dilemmas of an aging population.

## Staff Information

<b>Full Time Staff</b>	21
<b>Part Time Staff</b>	6
<b>Volunteers</b>	6
<b>Contractors</b>	1

## Staff Demographics - Ethnicity

<b>African American/Black</b>	8
<b>Asian American/Pacific Islander</b>	0
<b>Caucasian</b>	27
<b>Hispanic/Latino</b>	5
<b>Native American/American Indian</b>	0
<b>Other</b>	0 0

## Staff Demographics - Gender

<b>Male</b>	27
<b>Female</b>	13
<b>Unspecified</b>	0

## Formal Evaluations

<b>CEO Formal Evaluation</b>	Yes
<b>CEO/Executive Formal Evaluation Frequency</b>	Annually
<b>Senior Management Formal Evaluation</b>	Yes
<b>Senior Management Formal Evaluation Frequency</b>	Annually
<b>NonManagement Formal Evaluation</b>	Yes
<b>Non Management Formal Evaluation Frequency</b>	Annually

## Plans & Policies

<b>Organization has a Fundraising Plan?</b>	Under Development
<b>Organization has a Strategic Plan?</b>	Under Development
<b>Does your organization have a Business Continuity of Operations Plan?</b>	Yes
<b>Management Succession Plan?</b>	Under Development
<b>Organization Policy and Procedures</b>	Under Development
<b>Nondiscrimination Policy</b>	Under Development
<b>Whistleblower Policy</b>	No
<b>Is your organization licensed by the Government?</b>	No
<b>Permit?</b>	No

# Board & Governance

## Board Chair

<b>Board Chair</b>	Mr. George Dixon
<b>Company Affiliation</b>	Financial Advisory and Treasury Mgmt. Consultant
<b>Term</b>	Jan 2010 to Jan 2013
<b>Email</b>	George.Dixon@comcast.net

## Board Members

<b>Name</b>	<b>Affiliation</b>	<b>Status</b>
Mr. Owen Callaghan	Hays Companies	Voting
Ms. Jolyon Cowan	Cambridge Dept. of Human Services	Voting
Ms. Janie Gould	Greater Medford VNA	Voting
Ms. Cindy Hickey	Somerville Council on Aging	Voting
Mr. John Keegan	Ind. Non-Profit Operations Consultant	Voting
Mr. Barry Knamm	Retired	Voting
Mr. Gabriel Lopez Bernal	TransSystems	Voting
Mr. Allan Martorana	Brookline Bank	Voting
Mr. Russell Plato	Greenberg Traurig LLP	Voting

## Board Demographics - Ethnicity

<b>African American/Black</b>	1
<b>Asian American/Pacific Islander</b>	0
<b>Caucasian</b>	9
<b>Hispanic/Latino</b>	0
<b>Native American/American Indian</b>	0
<b>Other</b>	0

## Board Demographics - Gender

<b>Male</b>	7
<b>Female</b>	3
<b>Unspecified</b>	0

## Board Information

<b>Board Term Lengths</b>	3
<b>Number of Full Board Meetings Annually</b>	11

<b>Written Board Selection Criteria?</b>	No
<b>Written Conflict of Interest Policy?</b>	Under Development
<b>Percentage Making Monetary Contributions</b>	100%
<b>Percentage Making In-Kind Contributions</b>	25%
<b>Constituency Includes Client Representation</b>	No

# Financials

## Fiscal Year

<b>Fiscal Year Start</b>	July 01, 2012
<b>Fiscal Year End</b>	June 30, 2013
<b>Projected Revenue</b>	\$2,001,000.00
<b>Projected Expenses</b>	\$1,985,000.00
<b>Endowment?</b>	No
<b>Credit Line?</b>	Yes
<b>Reserve Fund?</b>	No
<b>Months Reserve Fund Covers</b>	0

## Detailed Financials

### **Revenue and Expenses**

<b>Fiscal Year</b>	<b>2012</b>	<b>2011</b>	<b>2010</b>
<b>Total Revenue</b>	\$1,910,594	\$2,090,999	\$2,211,881
<b>Total Expenses</b>	\$2,041,546	\$2,252,949	\$2,122,908

### **Revenue Sources**

<b>Fiscal Year</b>	<b>2012</b>	<b>2011</b>	<b>2010</b>
<b>Foundation and Corporation Contributions</b>	\$81,599	\$128,566	\$128,750
<b>Government Contributions</b>	\$0	\$0	\$0
<b>Federal</b>	--	--	--
<b>State</b>	--	--	--
<b>Local</b>	--	--	--
<b>Unspecified</b>	--	--	--
<b>Individual Contributions</b>	\$136,252	\$112,800	\$103,200
<b>Indirect Public Support</b>	--	--	--
<b>Earned Revenue</b>	\$1,724,117	\$1,790,373	\$1,817,315
<b>Investment Income, Net of Losses</b>	\$245	\$75	\$185
<b>Membership Dues</b>	--	--	--
<b>Special Events</b>	--	\$63,681	\$68,112
<b>Revenue In-Kind</b>	--	--	--
<b>Other</b>	(\$31,619)	(\$4,496)	\$94,319

### Expense Allocation

Fiscal Year	2012	2011	2010
Program Expense	\$1,713,247	\$1,890,906	\$1,672,028
Administration Expense	\$323,939	\$328,191	\$416,078
Fundraising Expense	\$4,360	\$33,852	\$34,802
Payments to Affiliates	--	--	--
Total Revenue/Total Expenses	0.94	0.93	1.04
Program Expense/Total Expenses	84%	84%	79%
Fundraising Expense/Contributed Revenue	2%	11%	12%

### Assets and Liabilities

Fiscal Year	2012	2011	2010
Total Assets	\$746,240	\$904,038	\$870,271
Current Assets	\$283,993	\$365,256	\$360,813
Long-Term Liabilities	\$195,445	\$159,741	\$184,304
Current Liabilities	\$474,672	\$534,246	\$307,044
Total Net Assets	\$76,123	\$210,051	\$378,923

### Short Term Solvency

Fiscal Year	2012	2011	2010
Current Ratio: Current Assets/Current Liabilities	0.60	0.68	1.18

### Long Term Solvency

Fiscal Year	2012	2011	2010
Long-Term Liabilities/Total Assets	26%	18%	21%

### Top Funding Sources

Fiscal Year	2012	2011	2010
Top Funding Source & Dollar Amount	--	--	--
Second Highest Funding Source & Dollar Amount	--	--	--
Third Highest Funding Source & Dollar Amount	--	--	--

## Capital Campaign

Currently in a Capital Campaign?	No
Capital Campaign Anticipated in Next 5 Years?	No

## Comments

### CEO Comments

The biggest financial challenge for SCM is the current economic austerity, especially with respect to government funding of health and human services. Eighty percent of our revenue comes from public funding- federal, state or local. Flat or declining government contracts combined with volatile fuel and insurance costs have made our core business model unwieldy. Similarly-funded transportation endeavors have closed one by one in Greater Boston. Our solution is twofold: We are diversifying our funding portfolio with fundraising, new programs, and more privately paid services. Some of the new programs, such as Door2Door to the Arts offer the dual benefit of enhancing our mission as well. As described herein, we are also branching out into mobility management- which can be seen as a "service" that compliments the transactional nature of trips. Significant federal funding is available for these activities and will remain available for the foreseeable future.

**Foundation Staff Comments**

Financial summary data in the charts and graphs are per the organization's audited financials. Vehicle grants, depreciation, and gain or loss on sale of vehicles is listed in other revenue.