

ITN Greater San Diego™

Dignified transportation for seniors

6161 El Cajon Boulevard, Suite B451, San Diego, CA 92115
(858) 751-4619 www.ITNGreaterSanDiego.org

Board of Directors

Rebecca Taylor, Chair
Senior Centers Advocate

Tony San Nicolas, Vice Chair
Founder, Renewing Life

Michelle Streeter, Secretary
Vice President, First Bank

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ITNGSD Chair Emeritus
Former Dir., CA Dept of Aging

Wende Chan, Member
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Alan E. Shumacher, M.D., Member
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State Medical Boards of the U.S.

Ndinda Spada, Member
Geriatric Care Mgr., Violet Care Svcs.

David Michael, Member
Client Development Mgr., Lytx, Inc.

Daniel San Nicolas, Ex-Officio
ITNGSD Dispatcher

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Ellen Bevier, former Metro Editor,
San Diego Union-Tribune

Marie Begay,
B.S., Gerontology, SDSU

June 2014

One Year and Going Strong! **Phoenix Rising From the Ashes**

It has been one year – actually, a little more than a year. ITN *Greater San Diego* started in early May, 2013, after the affiliation agreement of our predecessor had to be withdrawn by ITN *America*. By September we had a fully constituted Board of Directors and a pro-bono full-time Acting Executive Director. Our Board initiated and approved a long list of required government approvals – all the way from the IRS approval of our 501c3 to a business license in the City of San Diego. We had a \$4,000 fundraiser in mid-October and gave our first rides a week later. We average 40-50 rides a month, which is about average for a new affiliate.

Our membership and rider income has been supplemented by grants from San Diego County's Aging and Independence Services (\$5,000), the non-profit San Diego County Council on Aging (\$1,000) and First Bank (\$500). We will begin our new fiscal year (July 1) with bills paid and a start of \$5,000 to \$10,000 toward an estimated 2014-2015 budget of \$84,000.

Our new fiscal year begins July 1 at which time we will file our first IRS Form 990 – an extended document open to the public that shows how we have spent the money we have taken in and that our fiscal affairs are in accord with our mission and purpose as a non-profit. In San Diego many corporations and foundations require a copy of the 990 before they will make grants. This will also allow ITN *Greater San Diego* to be included on the web site of the respected San Diego Foundation. We anticipate that we will have far greater opportunities to be included in corporate and foundation philanthropy.

As in the myth of old, we are truly a "phoenix rising from the ashes"!

A New and Expanded Board Leadership...

At the ITN *Greater San Diego* Board meeting on May 27 new officers of the Board were elected to take office on July 1 and the Board grew by two new members, bringing the complement to 10 members. The Board of Directors meets on the fourth Monday of each month (except August and December). The four new top officers replace the group of pioneers who brought ITNGSD into operational being and will set forth an agenda for 2014-2015 that will be designed to expand areas covered in San Diego County – particularly in the south County.

Rebecca Taylor, Chair

Rebecca moves to Chair of the Board after a year as Treasurer. After years of studying abroad, she served in the US Navy from 2004-2009, including tours in Germany and Afghanistan. She has a B.S. in Gerontology from SDSU and is on the verge of her master's degree. She has been an intern and advocate in a number of senior community centers.

Tony San Nicolas, Vice Chair

Tony is the Director of *Renewing Life, Inc.*, a senior/disabled free transportation non-profit organization (including distributing food to the needy) in the South Bay. He also serves as the Senior Pastor of the Sunrise Church of Christ of the South Bay. Currently, he also serves as the Chair of the Commission on Aging for the City of Chula Vista and is the convener of the Commission's Senior Transportation Advocacy Program. Further he is a community volunteer for: Foster Care Recruitment, Domestic Violence Prevention and Senior Abuse Prevention.

Michelle Streeter, Secretary

Michelle is Vice President and Branch Manager of First Bank with over 20 years of experience in the banking industry. She has managed three offices in the Sand Diego area for Wells Fargo Bank, was Manager of the Year when she worked for US Bank and has been a manager for the San Diego Employees Credit Union. She is a 1995 graduate of Chapman University who has volunteered in numerous community groups where she specializes as a teacher.

Steve Wellington, J.D., Treasurer

Steve assumes the role of Treasurer replacing Rebecca Taylor, who is the new Chair of the Board. A 1984 graduate of San Diego State University in business and marketing with a 1994 J.D. degree from the University of San Diego, Steve is a real estate attorney in his own practice. Previously, he was a member of the law firm of Allen, Matkins, Leck, Gamble, Mallory & Natsis for 17 years. Steve will be assisted by **Batten Accountancy, Inc.**, a CPA firm that specializes in non-profit organizations. The Batten firm will prepare IRS filings, financial statements and an annual audit.

...Takes Office on July 1

Dixon Arnett (Chair Emeritus), Member

- Adjunct Professor and Lecturer, Osher Institute, San Diego State University
- Former Director of the California Department of Aging
- Former Deputy Under Secretary, US Dept of Health and Human Services
- Former Member of the California State Assembly (elected to four terms)

Wende Dawson Chan (Fmr Acting ED and Secretary), Member

- Former Director, COIL, (a \$1.2 million grant to provide outreach “InfoVans” to underserved populations with disabilities and the aged)
- Former Member, San Francisco Advisory Council on Aging
- Long Term Care Ombudsman for three years
- Manager of several small dental practices in San Francisco and San Diego

Alan E. Shumacher, M.D., F.A.A.P., Member

- Past President, Federation of State Medical Boards
- Past President, Medical Board of California (appointed by Gov. Pete Wilson)
- Director of Neonatology, Vice President/Associate Medical Director, San Diego Children’s Hospital (now Rady Children’s Hospital)
- Universities of Illinois (BS), South Dakota (BSM) and Iowa (MD); USAF

Ndinda Spada, Member

- Founder, Violet Care Services (an elder care company for over ten years)
- BA (Psychology), Alliant International University
- Certified Geriatric Care Manager (Kaplan University); certified in dementia

David Michael, Member

- Client Development Manager, Lytx, Inc. (transportation safety)
- Operation Homefront (Presidential Volunteer Service Award, 2011)
- Dual Major: MPA/Human Resources, National University
- U.S. Navy (seven years)

Daniel San Nicolas, Ex-Officio

- ITN *Greater San Diego* Dispatcher

A Profile of the Riders We Serve

Circular % circle

Grant from Regeneron, Inc. **Provides Support for Visually Impaired**

ITN *Greater San Diego* includes services to adults with visual impairment owing to a grant to ITN *America* from Regeneron, Inc., the pharmaceutical company that manufactures treatment for macular degeneration. Those with any visual impairment are directed to call 1-855-60-RIDES (1-855-607-4337) to register. The operators will then direct the caller to a transportation service in his/her area that can provide trips for doctor and hospital visits related to ophthalmology or optometry. The grant will pay \$40 of the ITNGSD annual membership fee of \$50 and the ride to and from the doctor is free.

Regeneron provides a quarterly stipend to ITNGSD and each of the other ITN *America* affiliates to cover the costs. In addition, ITN *America* matches the Regeneron grant for each ride that qualifies; hence, local affiliates actually reap an added financial benefit by promoting and providing these rides. Known as “Rides in Sight,” the grant is designed as a win-win. Regeneron gains wider recognition from the visually impaired patients they serve and ITN affiliates are subsidized as are the riders. In San Diego it seems, by word of mouth, the visually impaired community is already significantly aware of this service – judged by the number of inquiries ITNGSD receives and the rides we provide.

In the coming year the Board hopes to conduct an outreach effort to promote further knowledge of this grant among ophthalmologists and optometrists, placing flyers in doctors’ offices and perhaps raising sponsor-memberships from the doctors themselves.

AIS Grant: A Vital Endorsement!

\$5,000 Boost for New Fiscal Year

The month of April included a landmark grant received from San Diego County's Aging and Independence Services (AIS) of \$5,000, the largest single local gift ITNGSD has been given to date. This grant came at a time when the Board was also able to project that our monthly expenses through the 2013-2014 fiscal year would be met.

ITNGSD started with a grant of \$10,000 from *ITN America*, followed by a community fundraiser in mid-October, which netted \$4,000. In addition, previous grants from the San Diego County Council on Aging (a non-profit organization) and First Bank had combined with revenue from annual memberships and rider accounts to pave the way for a balanced budget.

Together, this means that ITNGSD will start the new fiscal year with bills paid and a \$5,000+ bank balance. We are seeking additional corporate support in the hope that the Board will be able to begin paying our dispatcher on a scale commensurate with income. (During our first year the Executive Director and Dispatcher duties have been volunteered pro-bono.)

The unrestricted AIS grant was announced by Director Ellen Schmeding. AIS is a unit of San Diego County's Health and Human Services Agency and is responsible for administering the programs of the Older Americans Act and the State's companion law, the Older Californians Act. It is one of the largest such units in California's network of 33 "area agencies on aging." Along with ITNGSD Board members, *ITN America's* founder and president, Katherine Freund, met with Director Schmeding during the American Society on Aging conference held in San Diego in March.

According to our affiliation agreement with *ITN America*, no more than 50% of ITNGSD's income can derive from public funds during the first five years, after which no income can come from taxpayer sources. This affiliation agreement applies to all 25 affiliates of *ITN America*. The purpose of this provision is to ensure that each affiliate grows with community recognition and financial support. While federal, state and local governments derive indirect savings from services that help older adults live independently – thus relying less on health care institutions – in time, to be truly successful, an *ITN America* affiliate must develop local "buy-in." The taxpayer-supported AIS grant to ITNGSD represents 23% of this year's income – well below the 50% mark.

With ITNGSD's first filings (July 1) of income and expenditures (IRS Form 990), we will be listed on the web site of the San Diego Foundation. This is an unofficial imprimatur informing corporations and foundations that we have matured through our first year and gained sustainability. This applies particularly to smaller family foundations. In the 2014-2015 fiscal year, the Board will focus on grant requests to these organizations.

- Our New One-Page Handout –

iTN GreaterSanDiego™ Dignified transportation for seniors

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(858) 751-4619 www.ITNGreaterSanDiego.org

Paving the road to Independent Living!

Our Mission

Seniors who give up the keys to their cars or have a restricted driver's license can rely on our "door-through-door, arm-through-arm" private transportation service and enjoy the freedom to live independently.

Who are we?

We are the 24th local affiliate of a national non-profit model

We are volunteer drivers who provide dignified transportation services for seniors and the visually impaired

Our volunteer drivers "bank" miles that they can use themselves or donate

Our service is 24/7

Our Goal

We provide service wherever we can, but our focus is south of I-8 where little or no service is offered now.

Who are our riders?

Almost 50% of our rides are for doctor and hospital visits

The rest are grocery store trips, church service attendance and visits with family and friends

Over 75% of our riders are women

What does it cost?

Riders pay an annual membership fee of \$50.00

Riders usually maintain an account of \$50.00; each ride draws down from the account – no money changes hands

There is a "pick-up" fee of \$4.00 for each ride

Riders pay a per/mile charge of \$1.50 (½ the cost of a taxi)

We are a non-profit service; we accept tax-deductible donations (including cars) and raise funds for "Roads Scholarships" to help low-income riders.

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The New Board of Directors
invites
The Council of Advisers
to a
Summer's Briefing/Reception
(Guests Invited!)

at

The Head Office of OASIS
1702 Camino del Rio North
San Diego, CA 92108
3rd floor of Macy's
Mission Valley Mall

Monday, July 21, 5:30 – 7:00 pm
(Meeting followed by a wine/cheese reception)

Please RSVP to dixarn@aol.com

Calling All Volunteer Drivers!

- Rider demand is increasing by the week!
- Currently, we have a small number of volunteer drivers working overtime to accommodate requests.
- Clearly, we can provide more service to more deserving people – particularly in areas not yet served – if we have the drivers to help.
- Volunteer drivers provide service when they can – as their own schedule allows.
- Our dispatcher matches demand with supply on our dispatch computer system
- Volunteer drivers earn credits for the miles they drive
- Volunteer drivers undergo a background check (including the DMV), their vehicles are given a safety check and there is a brief training session.
- The majority of volunteer drivers are those who are recently retired.

Fill out our volunteer driver application on-line on our web site:

www.ITNGreaterSanDiego.org

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