

ITN GreaterSanDiego™

Dignified transportation for seniors

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

**New Dispatch Telephone Number:
619-990-2226**

A Future Full of Promise! “Expanding to the South County”

In recent weeks, the ITNGSD Board hasn't been shy. One of the proven ways to “come from behind” is to look to the future. It is human nature that people want/need to look forward to bigger, better goals, not just fix what was broken (although what was broken will be fixed along the way).

The Board has authorized, by resolution, the application for a grant from SANDAG (funded by local bond funds) to expand ITNGSD's services into Southern San Diego County (from Coronado to the border) to offer our “door-through-door, arm-through-arm” model of transportation to areas that don't have these options. The two “very high” priorities of the SANDAG Consolidated Transportation Plan, 2013-2018, is service to the south County and what they even call “door-through-door” service.

The prospective grant is for two years. The total cost is \$295,810 involving the opening of a satellite office in Chula Vista. During the two years we project \$66,000 in memberships and ride revenues. SANDAG requires a 20% community “match”, which amounts to \$45,962. Our grant request for the two years, therefore, is \$183,848. The two-year grant is renewable two years hence.

The draft grant application was submitted by September 12. The final application was submitted by October 24. Committees of experts in aging and transportation will evaluate and rate the competitive grant requests. Those experts will submit their ratings to the SANDAG Board in early spring, 2015. The SANDAG Board will approve the awardees in late spring and the awarded projects will start July 1 (the same date as the ITNGSD fiscal year). Some might say that our initiative is “Chutzpah” but others advise “nothing ventured, nothing gained” – emphasis on “venture” as well as the immense public service promised!

Board of Directors

Rebecca Taylor, Chair
Senior Centers Advocate

Tony San Nicolas, Vice Chair
Founder, Renewing Life

Michelle Streeter, Secretary
Vice President, First Bank

Steve Wellington, J.D., Treasurer
Attorney-at-law

Dixon Arnett, Member
*ITNGSD Chair Emeritus
Former Dir., CA Dept of Aging*

Wende Chan, Member
*ITNGSD ED/Secretary Emeritus
Former Dir., InfoVans*

Alan E. Shumacher, M.D., Member
*Past President, Federation of
State Medical Boards of the U.S.*

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

Daniel San Nicolas, Ex-Officio
ITNGSD Dispatcher

Council of Advisers

Floyd Willis, Chair
AIS Transportation Representative

Kathy Randall, LCSW
Chair, AIS Advisory Council

Judy Stern, Chair, Social Service
Transportation Council, SANDAG

Ernie Navarro, Liaison,
SD Councilwoman Lori Zapf

Mario Garrett, Ph. D.
Professor of Gerontology, SDSU

Christina L. Selder, Co-founder,
Consumer Advocates/RCFE Reform

Sonia Diaz, Administrative Assistant,
Dispatcher, West End Services

Joaquin Anguera, Ph. D., Prof. of
Gerontology; former Dep. Dir., AIS

Jerry and Susan Pollock
*Real Estate Broker (Retired)
Television/Media*

Judi Bonilla
Exec. Director, “We Get Around”

Simona Valanciute
Executive Director., OASIS

Christine Murphy, Co-founder,
Consumer Advocates/RCFE Reform

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

Marie Begay,
B.S., Gerontology, SDSU

ITNGSD Files IRS Form 990

With professional review from Batten Accountancy, Inc., ITNGSD has filed its first IRS Form 990s – one for the 2011-12 FY when ITNGSD was originally incorporated although there was no Board and no income or expenditures, a second for the 2012-13 FY when there was an earlier initial Board but no income or expenditures and one for our first fiscal year, 2013-14 FY, supervised by our Board of Directors and showing income of \$22,606 and expenditures of \$22,069 and assets of \$4,464. IRS Form 990 is required by law, but is intended as a public document to show that funds raised and spent are in accord with the purpose of a non-profit organization which has been granted 501-c-3 status by the IRS.

At the same time, our accountants filed our Annual Financial Statement. It is important to note that, while this statement is public record (e.g. transparent and accurate), it is a “compilation” of data from Quickbooks, but it is not a formal annual audit, required by the ITNGSD by-laws. According to the rules of accountancy, the annual audit must be done by a separate auditor, which the Board will commission this fall.

The San Diego Foundation

The role of The San Diego Foundation, with over \$800 million in endowment, is paramount in San Diego philanthropy. There are few doors that can be opened in the San Diego corporate and family foundation community without being presented (with profiling) on their web site. Almost all non-profit organizations seeking funding are researched on the Foundation web site.

The San Diego Foundation requires that “new” non-profits, with all their government approvals, have been sustained financially for a year, filed the IRS Form 990s and have an Annual Financial Statement. ITNGSD has passed those milestones and has applied for recognition by the San Diego Foundation – potentially opening inquiry and opportunity with potential donors, including corporate sponsors. Look at the web site of The San Diego Foundation and click on “Better Giving”.

Community Fundraising

Leading up to the future of a SANDAG grant and, in the interim, a major fundraising event – perhaps events (plural) – is the key to fulfilling this fiscal year’s budget and leading to raising the “match” funds for the grant. We will start with our “Family Fundraiser” (see page 5) as a way of covering current costs and providing “up-front \$\$\$” for a major event in Spring, 2015. “Production Two/77”, a professional fundraising firm with experience in the non-profit world, is our partner in these events. We have explored multiple ideas – many with considerable potential publicity attached. What we have planned is to team with a local antique auto club to provide rides (with INTGSD riders aboard) starting in Liberty Station on a showcase route with a family-friendly picnic back at Liberty Station – and the cars would be sponsored by corporations? \$\$\$, yes! Intriguing idea, you bet!

When Planning for Retirement, Consider Transportation

by Harriet Edleson



Roland and Rosemarie Dion live on the eastern edge of San Diego, and have begun planning for a carless future. They have considered moving, but have not yet made any concrete decisions.

For Roland Dion, 81, who lives on the eastern edge of San Diego, being isolated in a place where the car rules is all too real a possibility.

“Out here, it’s cars,” Mr. Dion said. “Cars, cars, cars, cars.” Doctor appointments, grocery shopping, movie theaters, even reaching the beach from where the Dions live all require a car. “If you don’t have a car, you’re stranded,” said Mr. Dion, a retired marriage and family therapist. He and his wife, a master weaver, moved to California 38 years ago from Connecticut.

While he still drives 16 miles — on three freeways — to writers group meetings, he has decided the time has come to plan for a carless future.

On a recent Thursday afternoon he took a first step in that direction. He and his wife, Rosemarie, also 81, drove to the Grossmont trolley station, part of the Metropolitan Transit System, and rode

When Planning for Retirement, Consider Transportation ...

(Continued from Page 3)

the green line toward Old Town, where they spent part of the day exploring. They traveled in a group led by Judi Bonilla, a gerontologist and founder of [We Get Around](#). The organization is a fledgling nonprofit that promotes the use of public transportation for adults who believe they may be near the end of their driving days.

But in places like San Diego, the transition is not an easy one. From their home, the nearest bus stop is a mile walk. “I can still do it,” Mr. Dion said. But his wife cannot.

“All of this is well and good while you have your health,” he added. Yet, he allowed, “You can’t do all the things you used to do.” The Dions contemplate relocating but so far haven’t taken any action.

“She likes San Diego,” Mr. Dion said of his wife. “I don’t know anyone in Connecticut anymore.” Their grown children live in San Francisco and Illinois.

The situation the Dions face now is likely to become more common as aging baby boomers age even more. During [retirement](#) planning, transportation is often an afterthought. Yet, figuring transportation into plans is essential, experts say.

According to the [American Journal of Public Health](#), Americans are outliving their ability to drive safely — a woman, on average, by 10 years, a man by seven. Over all, the ability to drive safely as one ages depends on health. Some people can drive into their 90s while others begin to cut back at 65.

And yet, most people prefer not to think about the day when they have to rely on others or use public transportation for routine activities. “People avoid the topic,” said Beth Shapiro, a licensed clinical social worker in Rockville, Md., who runs the Jewish Social Service Agency’s “To Drive or Not to Drive” program.

“When people make [retirement](#) plans, they make no transportation plans because they assume they’re going to drive forever,” said Katherine Freund, founder and president of the [Independent Transportation Network](#), a nonprofit organization that provides rides for older adults, with 27 affiliates throughout the country. Nationally, for those over 65, 2 to 3 percent of what distance they travel is on public transportation, 8 percent on foot and the rest by car, Ms. Freund said.

Not driving by choice is different from realizing you are no longer fit to drive. Deciding to drive less typically happens incrementally. People might decide to stop driving at night to unfamiliar places, for instance. But regardless of the reason, not driving can limit your autonomy, even your social life, depending on where you live.

(Continued on Page 6)

The ITNGSD “Family” Fundraiser!

Bistro/Sixty on the Blvd (A Walk-in Wine Cellar)

5987 El Cajon Blvd, SD 92115

(turn west on El Cajon from the College/El Cajon corner; it's one block on the left and parking - at Union Bank & Citi Bank lots across the street - is free)

Wine and Gourmet Hors d'oeuvres

Tuesday, November 11, 5:30 pm – 7:30 pm

\$75/person; \$125/couple

Veteran's Day! Our featured guest: An 88-year-old Marine combat veteran of three of our nation's wars - WWII, Korea and Vietnam - Major Hal Jellison, a regular rider on our ITNGSD service. He's been there, done that and bought the tee shirt. Ask him about the Tootsie Rolls the Marines heated under their arms to thaw them from the Korean cold!

- **On October, 2013, we raised \$4,000 to kick-start a service that is now providing 60-70 rides a month to seniors and the visually impaired! We have 7 volunteer drivers (and seeking more as demand has been increasing).**
- **ITNGSD is among the leaders of ITN America affiliates (by percentage) giving rides to the visually impaired.**
- **We've submitted an application to SANDAG for a two-year grant to expand our services into South San Diego County, which, if awarded, will begin July 1, 2015.**
- **Our IRS Form 990s are officially filed and our Annual Financial Statement for 2013-2014 is public record.**
- **We are on The San Diego Foundation web site and our mission and purpose has been profiled by them – available to corporate and family foundation donors.**
- **We need new dollars to sustain our operations until we can have a major San Diego-wide community fundraiser in the Spring of 2015 and to provide up-front costs for that event.**

When Planning for Retirement...

(Continued from Page 4)

Even in places like Washington, D.C., which has a strong public transportation network that extends into suburban neighborhoods, it can be “that last mile” that is the hardest, Ms. Shapiro said. “You can get most of the way there.”

But getting from public transportation to your final destination or walking a mile or more to a bus stop could present an insurmountable challenge, especially on freezing winter days or hot, muggy stretches, she said. For some, getting on and off buses could be an obstacle.

When planning ahead, think about whether you prefer to stay in your community, plan to downsize or will relocate. According to a 2014 AARP study, by age 65 and older, 87 percent of people want to remain in their current community as they age. Financial and family considerations play a role in decisions about where to live.

“If you’re 55, you have to project out into the future,” Ms. Bonilla said.

In car-oriented areas like San Diego, people often rely on a network of family and friends for transportation. But there aren’t always younger family members available to drive those in their 80s and 90s. Sometimes, family members live in another city or state.

Transportation is the second highest household expense after housing, according the Office of Planning, Environment and Realty, which is part of the Department of Transportation’s Federal Highway Administration.

Those living in households that are car-dependent spend 25 percent of income on transportation. By living closer to work, shopping, restaurants and other amenities, households can reduce transportation costs to 9 percent of their total income.

The Independent Transportation Network requires riders to fund a personal transportation account in advance; riders receive a monthly statement detailing all payments — charges that are often lower than using taxis. Drivers assist riders in reaching their destinations and with packages. No money is exchanged during the ride and tips are not permitted.

Potentially filling the void are a number of new transportation services that provide rides for a fee, including Uber, Lyft and Sidecar. Some senior housing communities have shuttle buses that take residents to medical appointments; each one is different, so it is important to check when you are considering places to live.

Whatever decision you make about where to live and transportation, here are some guidelines from experts:

...Consider Transportation

(The New York Times, 10/17/2014)

ANALYZE your current neighborhood in terms of where you typically need and want to go, and determine how you might reach those places if you weren't driving. Include leisure activities like classes, entertainment and simply meeting friends. "Think about how you're going to do that when you can no longer drive," Ms. Bonilla said. "Lay out a grid and see how far these trips are from your home. That will determine where you live, whether you stay in your home."

LOOK AT the social support where you live. "Think about your network of friends, family, fraternal and faith-based organizations because those are the places where you have established relationships," said Ms. Bonilla, who is 57.

If you plan to continue driving, [AAA](#) offers resources like making sure your car suits you ergonomically and information about renewing your driver's license where you live.

CONSIDER becoming a volunteer driver through an [Independent Transportation Network](#) affiliate as Jacqueline Masumian, 67, a retired landscape designer from Westport, Conn., has. "I chose to make a plan if I become incapacitated or my eyes fail me," said Ms. Masumian, who lives with her husband. By driving others, she builds credits for rides if the day comes when she is no longer able to drive. "Here it would be impossible to live without a car," she said. "If I'm old and alone I thought I'd like to have somebody drive me around."

Joel Beckoff, who turns 59 this month, also volunteers as a driver once a week through the [Coastal Connecticut](#) affiliate of the Independent Transportation Network. A certified public accountant who worked for various corporations during his career, Mr. Beckoff retired a year ago. He doesn't expect to use the stored driving credit, but "it's nice to know it's there," he said. He and his wife, Arline, have considered moving to Manhattan someday, where public transportation seems limitless, compared with most places in the country. "When I can no longer drive, I don't expect to be living in suburbia," he said.

ITNGSD's New Dispatch Number:
619-990-2226

Car Donations – Vital Assets

On occasion, an ITNGSD rider who has given up the car keys won't have use for the car sitting in the garage. Car donations to ITNGSD can provide a major boost to either our operations or our budget. Donated cars that pass safety and maintenance tests can be used as an ITNGSD fleet car assigned to a volunteer driver and, if used in this fashion for one year or more, provides a higher than usual tax deduction. Donated cars can be auctioned off and, after accounting for fees, can receive a deduction for the auctioned amount. Or cars can simply be donated as a gift but the tax deduction is limited. Clearly, cars we can actually keep on the road are the most valuable to us and the donor.

The ITNGSD Board of Directors has voted to join other ITN affiliates to become part of the national car donation network of ITN America which has a vendor (itself non-profit), Charitable Auto Resources (CARS). Local affiliates receive 78% of the proceeds. Donors can let ITNGSD know and the details of the donation will be arranged. CARS is a convenience for donors and no affiliate is required to use CARS, but its fees and percentage of retention of auction or sale prices are comparable to charges that are made by local for-profit towing companies and auctioneers. When one compares the cost of owning a car (loan, depreciation, maintenance, gas, insurance, etc.) when it is driven little, if at all, or just sitting unused, then a donation makes sense, particularly if the donation is coming from a rider using our services!

ITN Greater San Diego
6161 El Cajon Blvd., #B451
San Diego, CA 92115
858-751-4619