

# GoodGiving.net

AN INITIATIVE OF BLUE GRASS COMMUNITY FOUNDATION



Nonprofit profile provided by Blue Grass Community Foundation

## ITNBLUEGRASS



### General Information

#### Contact Information

|                     |  |
|---------------------|--|
| <b>Nonprofit</b>    | ITNBLUEGRASS   |
| <b>Address</b>      | 1206 N Limestone Street<br>Lexington, KY 40505                               |
| <b>Phone</b>        | (859) 252-8665   |
| <b>Fax</b>          | 859 252-4393   |
| <b>Email</b>        | <a href="mailto:laura.dake@itnbluegrass.org">laura.dake@itnbluegrass.org</a> |
| <b>Contact Name</b> | Laura Dake   |

#### Web and Social Media

|                 |                 |
|-----------------|-----------------|
| <b>Website</b>  | <b>Website</b>  |
| <b>Facebook</b> | <b>Facebook</b> |
| <b>Twitter</b>  | <b>Twitter</b>  |

#### At A Glance

|                        |                                 |
|------------------------|---------------------------------|
| <b>IRS Ruling Year</b> | 2008                            |
| <b>Former Names</b>    | Friends of ITN in the Bluegrass |

**Other ways to donate, support, or volunteer**

Do you have a driving desire to help people? Consider becoming a volunteer driver with ITN*Bluegrass*!

ITN*Bluegrass*, a nonprofit senior transportation service and a local affiliate of national nonprofit ITN*America*, is growing! ITN*Bluegrass* provides safe, affordable, dignified automobile transportation to people 60+ and adults with visual impairments 24/7 anywhere in Fayette and northern Jessamine Counties and Versailles in Woodford County for any reason. Service is “arm-through-arm, door-through-door.”

As a volunteer, you earn mileage credit for every mile you drive that you can accrue in an account for your future transportation needs or donate to someone else to use right now. You also receive a free yearly ITN membership that you can keep for yourself or give away. Every volunteer is covered by volunteer insurance.

You may drive as much or as little as you'd like, on your schedule. Following a two-hour training and background check, you're ready to go meet some really nice people and hear some interesting stories! To schedule a training or to ask questions, please call Laura at 859-351-0460 or email her at [info@itnbluegrass.org](mailto:info@itnbluegrass.org). A volunteer driver application is available online at [www.itnbluegrass.org](http://www.itnbluegrass.org).

Volunteer drivers help older adults and those with visual impairments stay connected to families, friends, and activities!

# Statements & Search Criteria

## Statements

### **Mission Statement**

The mission of ITNBluegrass, a local affiliate of the national nonprofit ITNAmerica, is to provide safe, dignified, affordable, community-based and community-supported 24/7 automobile transportation to people age 60 and over and adults with visual impairments who have given up or limited their driving.

The ITN (Independent Transportation Network) is designed to replicate the feelings of independence as well as the comfort and convenience of private automobile ownership. At the same time, it uses a combination of sophisticated software technology and consumer incentives to achieve the characteristics of mass transit--efficiency through matching drivers and riders in the same geographical areas, shared rides and advanced planning.

ITNBluegrass is open to anyone 60 years or older and adults with visual impairments. Riders join the service as members and can schedule rides 24 hours a day, seven days a week, for any reason within the service area (all of Fayette County and northern Jessamine County). Other key features of the program include "arm-through-arm, door-through-door" service where members may be assisted with steps and packages, and the option of traveling alone or with others. Low-income riders may apply for a "Road Scholarship" to help with the cost of rides.

Volunteers are the backbone of the ITN model and the way affiliates remain economically sustainable.

Volunteer drivers give rides in their own vehicles. Rides are mostly scheduled in advance, and drivers choose their own schedules.

ITNBluegrass imagines a day when all seniors and adults with visual impairment will have transportation when they want it.

### **Background Statement**

In mid-2006, Executive Director Gale Reece, having retired from her position as founder and head of the most respected information management company in the Bluegrass, turned her attention to elder issues, a longtime interest. She submitted an application to be accepted into an ITNAmerica Learning Cluster after learning that transportation was a significant obstacle to elders maintaining their independence. Upon having the application accepted, she put her extensive business skills to work trying to build support for and spread awareness about this innovative transportation alternative.

Laura Dake joined her as part of a small fundraising team in late 2006, then in July 2007 became ITNBluegrass' Deputy Director, which had been accepted as an ITN affiliate around the same time. Just two weeks later, the Kentucky Transportation Cabinet contacted them to say that ITNBluegrass would be unable to operate! (Previously, they were told that no state laws prevented the service from operating.)

Because ITNBluegrass would be charging a fare for rides, it would be under the same regulations as a vehicle-for-hire (taxis and limos). These regulations suppose that the vehicles being used are owned by the organization and therefore are covered by commercial insurance. The ITN model is sustainable because it uses many volunteers with their own automobiles and private insurance; to buy vehicles and commercial insurance for everybody is not feasible.

Lexington Rep. Susan Westrom sponsored a bill to exempt ITNBluegrass from KRS 605.281; the bill passed the House and Senate unanimously, and the bill was signed into law by Kentucky Governor Steve Beshear on April 24, 2008. It reads: (16) Motor vehicles used in the transportation of persons who are sixty (60) years of age or older or who are visually impaired, if the motor vehicles are owned by a nonprofit organization or being used on behalf of a nonprofit organization that is exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code. Motor vehicles owned and operated by a nonprofit organization that are exempt under this subsection shall be subject to liability insurance coverage as established by KRS 281.655. Motor vehicles owned privately but operated on behalf of a nonprofit organization that are exempt under this subsection shall be subject to liability insurance coverage as established by KRS 304.39-110.

## **Impact Statement**

Accomplishments from the past year:

1. Since giving its first official ride in September 2008, ITNBluegrass delivered its 25,000 rides in April 2013! Despite starting service the month the stock market crashed, ITNBluegrass has managed to grow and -- with local community support -- is on track to be sustainable in its 5th year of operations, which is what the ITN model encourages for affiliates. (ITNAmerica defines sustainability as having sufficient resources to meet community need/demand through a combination of fares from those who use the service and voluntary local community support, without the use of taxpayer dollars.)
2. ITNBluegrass received among the highest overall rankings of any affiliate in both 2012 ITNAmerica-administered Customer Satisfaction survey.
3. ITNBluegrass is presenting sponsor of the i know expo, which debuted on April 14, 2013, at the Lexington Center. The expo is a resource fair for caregivers and those who want to age independently. About 900 people attended what we plan to offer as an annual event.

Goals for the FY 2013-14:

1. We work very hard to please our customers and drivers and hope to see continued excellent results on the 2012 satisfaction surveys.
2. We want to continue to see upward growth of rides and riders, which we can track on ITNAmerica's "Affiliate Comparisons" feature on our ITN portal. By the end of our fiscal year (June 2013), our goal is to have delivered 27,000 rides since beginning ride service. In addition, we want equal growth in the number of volunteer drivers.
3. We are working on securing more local support, especially from the business community.

## **Board Chair Statement**

My name is Stan Wonn and I am a volunteer driver and chair of the Board of Directors for ITNBluegrass. Our mission is to provide efficient, cost-effective, dignified transportation for seniors 60+ and the visually-impaired. Arm through arm, door through door pick-up and delivery is what makes this organization different from a cab service or a bus service. Members of ITNBluegrass are like a family and our drivers -- driving the member in their own personal car -- treat every rider just like their mother or father. Safety and security, comfort and relaxation are the product of every ride given by ITNBluegrass and our record for on time pick-up is second to none. We are always there when needed.

Upon retirement I wanted to volunteer some of my time to a worthy organization trying to make a difference in my local community. ITNBluegrass is certainly doing that and much more. I am passionate about the mission of this organization and understand first-hand, with my mother, the impact of losing the capability to drive. She was an 85-year-old bundle of energy and often just got in her car to go to the store or visit friends day or night. Her independence was completely shattered when she found out she could no longer drive. This meant that she would have to rely on family and friends to go to all those many places she used to go. She didn't want to be a burden on anyone, including family or friends. Thus, rather than ask, on many occasions she just wouldn't go. As a result her ability to live life to the fullest was very limited. ITNBluegrass makes it possible for those seniors who no longer driver to live a full life without feeling like a burden or an imposition while also maintaining their dignity.

I have had riders on several occasions break down crying and telling me, "You just don't realize how much this service means to me because I don't have to rely on my children and friends to take me to my appointments. I can maintain my independence with ITNBluegrass."

As the number of seniors grows in Fayette and surrounding counties, the need for transportation alternatives will grow as well. We hope that you choose to support our mission and we welcome all people who wish to get involved as a driver, member-rider or donor.

## Service Categories

### **Primary Organization Category**

Human Services / Transportation Assistance

## Geographic Areas Served

### **Areas**

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Fayette County

ITNBluegrass will transport its member-riders to any address in Fayette County, Kentucky (Lexington) and northern Jessamine County.

# Programs

## Programs

### Ride Service

**Description**

Our ride service is our program. While we do have features that we call programs -- CarTrade/Donation, Healthy Miles and Ride & Shop (for businesses) and Birthday Credits, to name a few -- they are secondary to the goal of providing safe, on-time rides 24/7 by friendly, trained volunteer (and some paid) drivers. Our drivers go to any address in Fayette and northern Jessamine Counties for any reason.

Our proprietary software called ITNRides allows us to match riders and volunteers who live close to one another in order to make each ride as efficient as possible. We are also able to match rider needs with a particular vehicle (for example, one that can hold a wheelchair). The system holds names of emergency contacts as well, which are helpful should a situation arise with a rider, many of whom are in their 80s and 90s.

**Budget**

187000

**Category**

Human Services, General/Other Transportation Assistance

**Population Served**

Elderly and/or Disabled, ,

### Volunteer Driver Program

**Description**

Volunteer drivers are the backbone of an ITN affiliate and help us remain economically sustainable. Volunteers can earn cash for mileage accrued when a passenger is in the vehicle and transportation credits for both occupied and unoccupied mileage. All mileage is accrued at \$0.40/mile. There are several options for their mileage credits that drivers may choose: banking it for themselves for the future; donating it to a family member or friend; donating it to the Road Scholarship Fund for low-income riders; or donating it back to ITNBluegrass as a charitable contribution.

Volunteers may drive as little or as often as they like, on their own schedule. Volunteers receive training and undergo background checks. In addition to the cash/credits, volunteers also receive a free membership (value: \$50) every year they drive that they may keep for themselves or give to someone else.

**Population Served**

, ,

# Leadership & Staff

## CEO/Executive Director

|                           |                             |
|---------------------------|-----------------------------|
| <b>Executive Director</b> | Ms. Laura S Dake            |
| <b>Term Start</b>         | Oct 2011                    |
| <b>Email</b>              | laura.dake@itnbluegrass.org |

## Staff

|                                     |      |
|-------------------------------------|------|
| <b>Full Time Staff</b>              | 1    |
| <b>Part Time Staff</b>              | 12   |
| <b>Volunteers</b>                   | 40   |
| <b>Contractors</b>                  | 1    |
| <b>Retention Rate</b>               | 100% |
| <b>Management Reports to Board?</b> | Yes  |

## Staff Demographics - Ethnicity

|  |   |
|--|---|
| <b>African American/Black</b>          | 4 |
| <b>Asian American/Pacific Islander</b> | 1 |
| <b>Caucasian</b>                       | 7 |
| <b>Hispanic/Latino</b>                 | 1 |
| <b>Native American/American Indian</b> | 0 |
| <b>Other</b>                           | 0 |

## Staff Demographics - Gender

|                    |   |
|--------------------|---|
| <b>Male</b>        | 6 |
| <b>Female</b>      | 7 |
| <b>Unspecified</b> | 0 |

## Former CEOs

| <b>Name</b>            | <b>Term</b>           |
|------------------------|-----------------------|
| Ms. Gale Griffin Reece | July 2007 - Sept 2011 |

## Formal Evaluations

|  |          |
|--|----------|
| <b>CEO Formal Evaluation</b>                         | Yes      |
| <b>CEO/Executive Formal Evaluation Frequency</b>     | Annually |
| <b>Senior Management Formal Evaluation</b>           | N/A      |
| <b>Senior Management Formal Evaluation Frequency</b> | N/A      |
| <b>NonManagement Formal Evaluation</b>               | Yes      |

**Non Management Formal Evaluation Frequency**

Annually

State Information

Yes



# Plans & Collaborations

## Plans & Policies

|   |                   |
|---|-------------------|
| <b>Organization has a Fundraising Plan?</b> | Under Development |
| <b>Organization has a Strategic Plan?</b>   | No                |
| <b>Management Succession Plan?</b>          | No                |
| <b>Organization Policy and Procedures</b>   | Under Development |
| <b>Nondiscrimination Policy</b>             | Yes               |
| <b>Whistleblower Policy</b>                 | No                |
| <b>Document Destruction Policy</b>          | No                |

## Government Licenses

|   |    |
|---|----|
| <b>Is your organization licensed by the Government?</b> | No |
|---|----|

# Board & Governance

## Board Chair

|                            |                          |
|----------------------------|--------------------------|
| <b>Board Chair</b>         | Mr. Joseph Jarboe Acting |
| <b>Company Affiliation</b> | USAF (Retired)           |
| <b>Term</b>                | May 2014 to 0            |
| <b>Email</b>               | polecat43@twc.com        |

## Board Members

| <b>Name</b>             | <b>Affiliation</b>                                    | <b>Status</b> |
|-------------------------|---|---------------|
| Ms. Cyndi Allen         | Community Volunteer                                   | Voting        |
| Mr. Bennett Clark       | Clark Law Offices, PLLC                               | Voting        |
| Mr. James Drahovzal     | Retired   | Voting        |
| Ms. Lydia Jacobs        | Bluegrass Area Agency on Aging and Independent Living | Voting        |
| Mr. Joseph Jarboe       | US Air Force (retired)                                | Voting        |
| Ms. Amber Lakin         | Morning Pointe of Lexington                           | Voting        |
| Mr. William McKinney    | USAF (Retired)  | Voting        |
| Ms. Gale Reece          | Retired from ITNBluegrass                             | Exofficio     |
| Ms. Kathleen Richardson | Bluegrass Community & Technical College               | Voting        |
| Ms. Rhonda Turley       | Retired from Ashland Oil                              | 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 0 |

## Board Demographics - Gender

|                    |   |
|--------------------|---|
| <b>Male</b>        | 4 |
| <b>Female</b>      | 6 |
| <b>Unspecified</b> | 0 |

## Governance

|                                   |     |
|-----------------------------------|-----|
| <b>Board Term Lengths</b>         | 3   |
| <b>Board Term Limits</b>          | 3   |
| <b>Board Meeting Attendance %</b> | 78% |

|  |     |
|--|-----|
| <b>Written Board Selection Criteria?</b>           | No  |
| <b>Written Conflict of Interest Policy?</b>        | Yes |
| <b>Percentage Making Monetary Contributions</b>    | 91% |
| <b>Percentage Making In-Kind Contributions</b>     | 80% |
| <b>Constituency Includes Client Representation</b> | No  |
| <b>Number of Full Board Meetings Annually</b>      | 10  |

## Board Co-Chair

|                            |                       |
|----------------------------|-----------------------|
| <b>Board CoChair</b>       | Mr. Joseph Jarboe     |
| <b>Company Affiliation</b> | USAF (Retired)        |
| <b>Term</b>                | June 2009 to Dec 2017 |
| <b>Email</b>               | polecat43@twc.com     |

## Risk Management Provisions

Commercial General Liability  
 Directors and Officers Policy  
 Automobile Insurance and Umbrella or Excess Insurance

## Standing Committees

Development / Fund Development / Fund Raising / Grant Writing / Major Gifts  
 Executive  
 Audit  
 Finance  
 Membership  
 Nominating

# Financials

## Fiscal Year

|                           |               |
|---------------------------|---------------|
| <b>Fiscal Year Start</b>  | July 01, 2016 |
| <b>Fiscal Year End</b>    | June 30, 2017 |
| <b>Projected Revenue</b>  | \$227,910.00  |
| <b>Projected Expenses</b> | \$206,021.00  |
| <b>Endowment Value</b>    | \$0.00        |
| <b>Percentage</b>         | 0%            |

## Detailed Financials

### Revenue and Expenses

| <b>Fiscal Year</b>    | <b>2015</b> | <b>2014</b> | <b>2013</b> |
|-----------------------|-------------|-------------|-------------|
| <b>Total Revenue</b>  | \$215,365   | \$190,302   | \$292,874   |
| <b>Total Expenses</b> | \$203,765   | \$203,424   | \$279,200   |

### Revenue Sources

| <b>Fiscal Year</b>                              | <b>2015</b> | <b>2014</b> | <b>2013</b> |
|---|-------------|-------------|-------------|
| <b>Foundation and Corporation Contributions</b> | --          | --          | --          |
| <b>Government Contributions</b>                 | \$42,436    | \$0         | \$0         |
| <b>Federal</b>                                  | --          | --          | --          |
| <b>State</b>                                    | --          | --          | --          |
| <b>Local</b>                                    | --          | --          | --          |
| <b>Unspecified</b>                              | \$42,436    | \$0         | --          |
| <b>Individual Contributions</b>                 | \$19,588    | \$81,758    | \$197,564   |
| <b>Indirect Public Support</b>                  | --          | \$0         | --          |
| <b>Earned Revenue</b>                           | \$108,270   | \$83,034    | \$77,610    |
| <b>Investment Income, Net of Losses</b>         | --          | \$0         | --          |
| <b>Membership Dues</b>                          | \$22,725    | \$25,510    | --          |
| <b>Special Events</b>                           | \$22,346    | \$0         | \$17,700    |
| <b>Revenue In-Kind</b>                          | --          | \$17,100    | --          |
| <b>Other</b>                                    | --          | \$0         | --          |

**Expense Allocation**

| <b>Fiscal Year</b>                             | <b>2015</b> | <b>2014</b> | <b>2013</b> |
|--|-------------|-------------|-------------|
| <b>Program Expense</b>                         | \$203,765   | \$203,424   | \$167,518   |
| <b>Administration Expense</b>                  | --          | \$0         | \$61,425    |
| <b>Fundraising Expense</b>                     | --          | \$0         | \$50,257    |
| <b>Payments to Affiliates</b>                  | --          | --          | --          |
| <b>Total Revenue/Total Expenses</b>            | 1.06        | 0.94        | 1.05        |
| <b>Program Expense/Total Expenses</b>          | 100%        | 100%        | 60%         |
| <b>Fundraising Expense/Contributed Revenue</b> | 0%          | 0%          | 23%         |

**Assets and Liabilities**

| <b>Fiscal Year</b>           | <b>2015</b> | <b>2014</b> | <b>2013</b> |
|------------------------------|-------------|-------------|-------------|
| <b>Total Assets</b>          | \$47,938    | \$14,115    | \$19,165    |
| <b>Current Assets</b>        | \$40,744    | \$11,819    | \$17,282    |
| <b>Long-Term Liabilities</b> | --          | \$31,671    | \$41,466    |
| <b>Current Liabilities</b>   | \$62,598    | \$69,483    | \$51,616    |
| <b>Total Net Assets</b>      | (\$26,260)  | (\$87,039)  | (\$73,917)  |

**Short Term Solvency**

| <b>Fiscal Year</b>                                       | <b>2015</b> | <b>2014</b> | <b>2013</b> |
|--|-------------|-------------|-------------|
| <b>Current Ratio: Current Assets/Current Liabilities</b> | 0.65        | 0.17        | 0.33        |

**Long Term Solvency**

| <b>Fiscal Year</b>                        | <b>2015</b> | <b>2014</b> | <b>2013</b> |
|---|-------------|-------------|-------------|
| <b>Long-Term Liabilities/Total Assets</b> | 0%          | 224%        | 216%        |

**Top Funding Sources**

| <b>Fiscal Year</b>                                       | <b>2015</b> | <b>2014</b> | <b>2013</b> |
|--|-------------|-------------|-------------|
| <b>Top Funding Source &amp; Dollar Amount</b>            | --          | --          | --          |
| <b>Second Highest Funding Source &amp; Dollar Amount</b> | --          | --          | --          |
| <b>Third Highest Funding Source &amp; Dollar Amount</b>  | --          | --          | --          |

**Capital Campaign**

|  |        |
|--|--------|
| <b>Currently in a Capital Campaign?</b>              | No     |
| <b>Goal</b>  | \$0.00 |
| <b>Capital Campaign Anticipated in Next 5 Years?</b> | No     |

**State Registration**

|                           |     |
|---------------------------|-----|
| <b>State Registration</b> | Yes |
|---------------------------|-----|

**Form 990s**

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Form 990

Form 990

Form 990

Form 990EZ

Form 990EZ

Form 990EZ

Form 990

Form 990

**Audit Documents**

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audit

audit 2

Audit 3



Blue Grass Community Foundation  
250 West Main Street, Suite 1220, Lexington KY 40507  
859-225-3343

