

PART I - FACE SHEET

APPLICATION FOR FEDERAL ASSISTANCE		1. TYPE OF SUBMISSION: Application <input checked="" type="checkbox"/> Non-Construction														
Modified Standard Form 424 (Rev.02/07 to confirm to the Corporation's eGrants System)																
2a. DATE SUBMITTED TO CORPORATION FOR NATIONAL AND COMMUNITY SERVICE (CNCS): 10/18/12	3. DATE RECEIVED BY STATE:	STATE APPLICATION IDENTIFIER:														
2b. APPLICATION ID: 13SR144116	4. DATE RECEIVED BY FEDERAL AGENCY: 10/18/12	FEDERAL IDENTIFIER:														
5. APPLICATION INFORMATION																
LEGAL NAME: Pima Council on Aging Inc DUNS NUMBER: 081706848	NAME AND CONTACT INFORMATION FOR PROJECT DIRECTOR OR OTHER PERSON TO BE CONTACTED ON MATTERS INVOLVING THIS APPLICATION (give area codes): NAME: Cecilia Salaz															
ADDRESS (give street address, city, state, zip code and county): 8467 E. Broadway Blvd Tucson AZ 85710 - 4009 County: Pima	TELEPHONE NUMBER: (520) 258-5071 FAX NUMBER: (520) 790-7577 INTERNET E-MAIL ADDRESS: csalaz@pcoa.org															
6. EMPLOYER IDENTIFICATION NUMBER (EIN): 860251768	7. TYPE OF APPLICANT: 7a. Non-Profit 7b.															
8. TYPE OF APPLICATION (Check appropriate box). <input checked="" type="checkbox"/> NEW <input type="checkbox"/> NEW/PREVIOUS GRANTEE <input type="checkbox"/> CONTINUATION <input type="checkbox"/> AMENDMENT If Amendment, enter appropriate letter(s) in box(es): <input type="text"/> <input type="text"/> A. AUGMENTATION B. BUDGET REVISION C. NO COST EXTENSION D. OTHER (specify below):	9. NAME OF FEDERAL AGENCY: Corporation for National and Community Service															
10a. CATALOG OF FEDERAL DOMESTIC ASSISTANCE NUMBER: 94.002 10b. TITLE: Retired and Senior Volunteer Program	11.a. DESCRIPTIVE TITLE OF APPLICANT'S PROJECT: RSVP-Tucson 2013															
12. AREAS AFFECTED BY PROJECT (List Cities, Counties, States, etc): ARIZONA #1 Serves all of Pima County, Tucson Metropolitan area, City of South Tucson, Community of Oro Valley, Marana, Picture Rocks, Catalina, Ajo and Gree	11.b. CNCS PROGRAM INITIATIVE (IF ANY):															
13. PROPOSED PROJECT: START DATE: 04/01/13 END DATE: 03/31/16	14. CONGRESSIONAL DISTRICT OF: a.Applicant <input type="text" value="AZ 008"/> b.Program <input type="text" value="AZ 008"/>															
15. ESTIMATED FUNDING: Year #: 1	16. IS APPLICATION SUBJECT TO REVIEW BY STATE EXECUTIVE ORDER 12372 PROCESS? <input type="checkbox"/> YES. THIS PREAPPLICATION/APPLICATION WAS MADE AVAILABLE TO THE STATE EXECUTIVE ORDER 12372 PROCESS FOR REVIEW ON: DATE: <input checked="" type="checkbox"/> NO. PROGRAM IS NOT COVERED BY E.O. 12372															
<table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <tr> <td style="width: 20%;">a. FEDERAL</td> <td style="text-align: right;">\$ 58,420.00</td> </tr> <tr> <td>b. APPLICANT</td> <td style="text-align: right;">\$ 60,049.00</td> </tr> <tr> <td>c. STATE</td> <td style="text-align: right;">\$ 0.00</td> </tr> <tr> <td>d. LOCAL</td> <td style="text-align: right;">\$ 42,550.00</td> </tr> <tr> <td>e. OTHER</td> <td style="text-align: right;">\$ 17,499.00</td> </tr> <tr> <td>f. PROGRAM INCOME</td> <td style="text-align: right;">\$ 0.00</td> </tr> <tr> <td>g. TOTAL</td> <td style="text-align: right;">\$ 118,469.00</td> </tr> </table>	a. FEDERAL	\$ 58,420.00	b. APPLICANT	\$ 60,049.00	c. STATE	\$ 0.00	d. LOCAL	\$ 42,550.00	e. OTHER	\$ 17,499.00	f. PROGRAM INCOME	\$ 0.00	g. TOTAL	\$ 118,469.00	17. IS THE APPLICANT DELINQUENT ON ANY FEDERAL DEBT? <input type="checkbox"/> YES if "Yes," attach an explanation. <input checked="" type="checkbox"/> NO	
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b. APPLICANT	\$ 60,049.00															
c. STATE	\$ 0.00															
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f. PROGRAM INCOME	\$ 0.00															
g. TOTAL	\$ 118,469.00															
18. TO THE BEST OF MY KNOWLEDGE AND BELIEF, ALL DATA IN THIS APPLICATION/PREAPPLICATION ARE TRUE AND CORRECT, THE DOCUMENT HAS BEEN DULY AUTHORIZED BY THE GOVERNING BODY OF THE APPLICANT AND THE APPLICANT WILL COMPLY WITH THE ATTACHED ASSURANCES IF THE ASSISTANCE IS AWARDED.																
a. TYPED NAME OF AUTHORIZED REPRESENTATIVE: Cecilia Salaz	b. TITLE:	c. TELEPHONE NUMBER: (520) 546-2002														
d. SIGNATURE OF AUTHORIZED REPRESENTATIVE:		e. DATE SIGNED: 10/18/12														

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Executive Summary

An estimated 302 RSVP volunteers will serve older adults, homebound elders, and persons with disabilities, including but not limited to veterans, refugees and people of Hispanic origin. The primary focus area is Healthy Futures. Activities will include Medicare counseling, personal financial literacy, and transportation to medical, grocery and social services. Eight stations (1 area agency on aging and 7 non-profit neighborhood based stations) will provide services. At the end of the 12 month period, we anticipate 150 individuals (homebound and/or older adults and/or persons with disabilities) will report having increased social ties or perceived social support. Particular effort will be made to reach and expand these services to elder and disabled veterans as well as identify those veterans who are currently being served.

The CNCS federal investment of \$58,420 will be supplemented by \$60,049.

Strengthening Communities

Pima County, located in southern Arizona, is the state's second largest county and in 2010 was the country's 41st largest (Pima Association of Governments). It covers an area of 9,184 square miles (a little smaller than the state of Vermont) with a total population of 980,262 and includes the cities of Tucson, Marana, Oro Valley, Sahuarita, and South Tucson, ten mostly rural unincorporated areas and the San Xavier, Pascua Yaqui and Tohono O'odham Nations (Pima County Government webpage, <http://www.pima.gov> and Netstate.com- http://www.netstate.com/states/tables/st_size.htm). Pima County is home to 209,742 individuals 60 years of age or older, approximately 21.4% of the county population and while the population in the county grew by 16% from 2000 to 2010, during the same time period the population of the 60+ age group grew by 37% and the 85 and older age group by 52% (United States Census Bureau). Baby Boomers (born between 1946 and 1964) and those over 65 account for about 41% of the population in Pima County (United States Census Bureau, 2010).

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Since 1975, in order to identify the changing nature of Pima County's senior population and future trends, Pima Council on Aging (PCOA), the county's designated Area Agency on Aging, in collaboration with the City of Tucson, Pima County, and the United Way of Tucson and Southern Arizona have implemented the Area Plan on Aging Public Needs Assessment process consisting of county-wide focus groups, surveys and public comment meetings. Most recent data (2009) from the assessment show that:

- Older adults continue to identify the need for adequate transportation, understanding Medicare; and knowing where to go for information and assistance.
- Pronounced in this current needs assessment was the number of individuals concerned with income to meet their basic needs. For example, being able to establish a budget.
- New areas of concern were memory loss, depression and/or anxiety, and loneliness. People were concerned how to engage their neighbors and friends who were alone.
- Professionals working with older adults voiced concerns with the growth of the population needing assistance and the dramatic reduction in the resources to serve them.
- Older adults are moving to rural areas, believing it will be cheaper without realizing there are no or limited resources and services.
- Fewer older adults can rely on family members for assistance as families are geographically distanced and have financial hardships.

Anecdotal evidence provided by RSVP leaders of existing neighborhood stations universally agree that transportation service assistance (mostly to medical appointments and for grocery shopping) is the number one requested service.

Spanish is the language most commonly spoken by limited English proficient people in the county. According to the 2000 Census, 23% of the county population speaks Spanish and of those Spanish-speakers, 36% report speaking English less than "very well" (Tucson City Court Administrative Policy,

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<http://cms3.tucsonaz.gov/sites/default/files/courts/LEP.pdf>). While county data are not available to show how many elders 65+ years of age require and/or feel more comfortable speaking, reading and receiving information and services in Spanish, it is assumed from the data presented above that there is a need for RSVP services and volunteers to be bilingual in order to most effectively serve the county.

Pima Council on Aging knows there is a significant population of active military personnel/families and veterans living in Pima County due to the presence of Davis-Monthan Air Force Base (DMAFB), the county's mild winter climate and an excellent VA hospital. The Public Affairs office at DMAFB reports that there are approximately 7,000 active military personnel living in Pima County (telephone call on 10/18/2012). Aggregate data (2005-2009) from the American Community Survey (<http://censtats.census.gov/cgi-bin/usac/usatable.pl?State=&County=04019>) show that 100,538 veterans or 18.2% of Arizona's veteran population live in Pima County and is also the second largest veteran's population of the state's 15 counties.

Although PCOA in its 39 years of operating an RSVP program has been serving military families and veterans, data have not been specifically tracked or collected for these two segments of the population. Additionally RSVP has not made a concerted effort to locate and "recruit" veteran and military clients or volunteers.

Regardless of the state of the economy, there is never enough government, non-profit or private funding to fill all the needs of elders throughout the county. Over the last three years, seven RSVP stations manned by 350 volunteers (both RSVP and non-RSVP) provided multiple neighborly services such as transportation, errands, yard work, housekeeping and care giving relief to about 1000 unduplicated clients, representing .005% of the county's total older adult population. Clearly there is a strong need for many more stations, especially in rural areas. By building the capacity of the RSVP volunteers to manage RSVP community-based stations, many more elders will be served.

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As the designated Area Agency on Aging serving older adults and their families living in Pima County, Pima Council on Aging (PCOA) is positioned to operationally and strategically address these challenges. Established in 1967, PCOA identifies the needs of older adults in Pima County and responds to those needs with innovative programs and services. PCOA is responsible for administering, planning and coordinating services that assist older persons and their family caregivers - PCOA provides the infrastructure to assist them to make informed decisions that allow them to live at home or choose a viable option; preserves independence by funding a system of in-home community based services; and provides accurate information and counsel on a range of age related concerns. PCOA is the primary resource for advancing the social and economic interests of our community's older citizens, their families and caregivers.

PCOA established its RSVP program in 1973 and is at the forefront of organizing stations and placing RSVP volunteers to assist older adults and their families to meet the needs related to living independently and safely in their communities. This grant proposal emphasizes CNCS' focus on HEALTHY FUTURES with the objectives of aging in place and access to care. RSVP volunteers will provide the services outlined below.

OBJECTIVE: AGING IN PLACE - TRANSPORTATION 146 unduplicated RSVP volunteers will serve 300 elders; 210 elders will report increased social supports.

RSVP leaders in community based stations universally agree that transportation is the number one requested service. Homebound and frail elders are unable to walk to the bus stop, especially when temperatures exceed 100 degrees. In some areas, elders express concern for personal safety while walking to the bus stop. Not all older adults (henceforth referred to as "elders") are eligible for paratransit, which require a current ADA Eligibility Card and are limited to the metro area. Wait and travel times are long and difficult for elders who are on medication schedules or need access to restrooms due to incontinence. Assistance with carrying groceries is not available for bus riders and

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paratransit drivers only carry to the front door. Few elders can afford taxi fare. Rural public transit is non-existent or runs once a day. Without transportation, elders are at risk for poor nutrition, lack of medical care, and isolation. By having access to medical services, groceries, and socialization, elders are able to remain independently and safely in their homes. The annual survey that is currently administered confirms that elders report increased social ties and/or perceived support. For the past 2 years, PCOA data show that 30 elders who received supports from a neighborhood station program remained independent in their homes until the end of their lives. Ninety-four percent of active clients reported they received supports to help them remain at home.

Volunteer drivers will provide door through door transportation using their personal vehicles to pick up and transport elders to their medical, shopping, congregate meal, and social destinations. In addition to providing a ride for elders, RSVP drivers will provide the additional benefit of emotional support at doctor's offices, pushing and filling grocery carts and putting groceries away at the elder's home. Depending the elder's need that day, volunteers may stop at multiple destinations. Efforts will be made to match monolingual clients with volunteers who speak their language. Beyond just a ride, volunteers offer physical assistance, compassion, knowledge, and companionship. When volunteers find clients in medical distress, they will call 911.

OBJECTIVE: AGING IN PLACE -- PROVIDING FINANCIAL LITERACY 5 unduplicated RSVP volunteers will serve 10 elders. 9 elders will report increased social support.

Some elders have difficulty budgeting, paying routine bills and tracking finances. Their vision or hand-eye coordination fails so they can no longer write checks. Elders with dementia or on medication may make late or double payment and may find following a budget challenging. As a result, low income elders may end up paying late fees or worse, have essential utilities shut off. Failing to pay rent or mortgage can result in eviction or foreclosure proceedings being started. Poor credit scores impact the cost of financing and insurance. Collection agencies add a high level of stress.

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Scam artists or hard pressure salesmen convince elders already on a tight budget to buy things they don't need or give out sensitive information. Elders in these situations report a high level of anxiety and sleepless nights PCOA staff to provide free assistance and low income elder cannot afford to pay for the service.

Since 1991, PCOA's Budgeting Assistance Program has been the local Coordinating Agency for the AARP Money Management program. 90% of current recipients report that this service supports them in remaining at home. Elders in this situation are still able to manage their finances given a little bit of help which RSVP volunteers will provide. The volunteer will make a home visit and provides some or all of the following services: read mail, identify bills, write checks, balance the check register, and help develop a budget. Volunteers watch out for financially vulnerable elders by monitoring for unusual withdrawals made either by the elders themselves or by others who have been given access to their checkbooks. Some volunteers provide additional neighborly services such as grocery shopping, light housekeeping, and transportation to the doctor and other destinations. Depending on need, elders will be visited (average 2 hours a visit) weekly, bi-weekly or monthly. Approximately 50% of telephone calls from elders pertain to elder abuse and fraud prevention as a result of suspicious correspondence and phone solicitations; therefore, between visits, volunteers will answer calls from elders with these concerns. One-time consultations are available for bill collection harassment, and budgeting education to live within one's means.

OBJECTIVE: ACCESS TO CARE -- DISTRIBUTING INFORMATION 15 unduplicated RSVP volunteers will serve 800 elders.

PCOA's 2009 Needs Assessment identified Medicare as increasingly hard to understand. From the "New to Medicare" classes conducted by PCOA we know that even professionals such as doctors and lawyers confess to being confused. Elders do not understand how Medicare works and are confused by the myriad plan choices available, and need guidance. As a result seniors may pick a plan that may

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not suit their health and/or income needs. Because routine and billing correspondence uses Medicare jargon, elders don't understand their benefits, bills and claim summaries. This leads to elders' not receiving the health care they need. This is a problem every year, even for elders who have been on Medicare for decades because Medicare keeps changing. Insurance agents only emphasize the benefits of the particular insurance plan they are selling.

Volunteers will be trained to provide 1 on 1 Medicare counseling session lasting 1-2 hours each which can include information about how Medicare works, plan options, plan comparison, assistance with claims and appeals, and fraud resolution. No limit is placed on the number of sessions. Volunteers will be trained to help understand the relationship between Medicare and veterans' benefits.. They will help veterans identify the Medicare plans that best complement their VA, Tricare, and long term care benefits.

Recruitment and Development

The variety of programs that PCOA administers in-house and with community partners are offered to all RSVP volunteers and provide a plethora of high quality assignments for volunteers of all skill levels. Long term assignments at 20 volunteer stations are available as well as short term projects. There are excellent opportunities for volunteer leaders to exercise management and leadership skill through capacity building.

Within PCOA, activities are available to RSVP volunteers in insurance counseling, health education, and long term care resident advocacy. To address elders' concerns with income to meet their basic needs, future plans include recruiting RSVP volunteers to assist low income older adults with filling out the Arizona Property Tax Refund, refunding up to \$525 of property taxes directly to elder homeowners and tenants. Volunteers with a passion to serve our armed forces and their families can currently volunteer at the DM Air Force Base Hospital and will soon be able to volunteer at the new

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station that is being developed at the VA Hospital in collaboration with the VA Volunteer Caregiver Support Program. Long standing relationships with three museums, a non-profit hospital, adult learning center, thrift shop, the Tucson Police, Pima County Sheriff, and the Pima County Health Department offer additional opportunity for assignments.

Volunteers interested in capacity building may do so as neighborhood station volunteer leaders, who have the opportunity to enhance transportation services with activities that are specific to their communities (such as grocery shopping, yard and light house work, putting out trash and picking up mail) and make referrals to supporting agencies for more involved needs. Among many examples, one volunteer station has created a senior canteen; another has begun a laughing yoga class. The existence of an organized station lends credibility to what would otherwise be individual volunteer's activities and draws resources into the community such as neighborhood associations (financial, outreach, and programmatic support); University of Arizona students (editorial services, yard work, elders writing group), active duty Air Force squadrons (yard work); Junior League of Tucson, Habitat for Humanity, Teaching and Learning (home repair), Frys' Supermarket (outreach location).

PCOA was instrumental in establishing the Neighbor's Care Alliance (NCA), an award-winning, county-wide network of neighborhood-based stations that provide support to elders to help them remain independent and in their homes. RSVP volunteers will have the opportunity to participate in this alliance as station leaders. The Neighbors Care Alliance will bring together volunteer leadership on a monthly basis. Monthly sessions include training, problem-solving, and brain-storming designed to increase the skills, knowledge and leadership abilities of station leaders.

PCOA offers the opportunity to be part of the Ambassador program, a unique grassroots, residential,

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educational, information, referral and advocacy program for seniors and those who assist them. RSVP volunteer Ambassadors will serve their community area from an assigned site and improve access to needed services by making PCOA and other community resources and services known to elders and their caregivers. Ambassadors will act as the "go to" person; making referrals to staff at PCOA and other community agencies while serving as a conduit providing feedback and input regarding community issues and needs to the RSVP program and PCOA. The program is currently being expanded to encourage Ambassadors to make themselves available to friends and associates in their daily life activities, making it known that they are serving as PCOA Ambassadors everywhere they go (like where they buy groceries, where they have their dry cleaning done and where they golf, etc.)

Both the Neighbors Care Alliance (the association of RSVP neighborhood stations that is administered by PCOA) have been nationally recognized by the National Council on Aging (NCOA) and the National Association of Area Agencies on Aging (N4A) as innovative community based solutions to elder's needs.

PCOA, in conversations this year with VA administrators, current RSVP volunteers, and veteran's families, identified an increased need for awareness and access to community-based services for seniors and disabled veterans. As a result, the RSVP Director will partner with the Veteran's Administration Voluntary Services (VAVS) to provide cross-training for the VAVS and the RSVP volunteers to increase information about services available in the community for elder and disabled veterans to support independent living at home.

Training is tailored to each RSVP assignment. Within the neighborhood stations, one on one consultation by PCOA Outreach Coordinators will provide guidance on forming and sustaining non-

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profit boards. Leadership training will include a How-to Manual and how to train volunteers using a DVD and training materials developed by PCOA. PCOA's Neighbors Care Alliance encourages volunteer station leaders to assist other stations. For example, a station leader will provide training to other stations with new or inexperienced leaders. PCOA staff will conduct annual site visits to review and consult with volunteer leaders regarding policies, procedures, and best practices. The Neighbors Care Alliance meeting will provide peer support. PCOA staff specialists will provide additional support to RSVP volunteers regarding any questions related to aging.

Financial Literacy volunteer training will consist of 3 hours initial training and will be accompanied by the PCOA staff specialist on the volunteer's first client visit. PCOA provides additional support with a part-time administrative aide. A team leader will monitor volunteer performance and feedback during monthly team meetings. Monthly reports will be further reviewed by RSVP Administrative Aide and input into tracking database.

Volunteer Medicare counselors will receive 30 hours initial classroom training, 16 individual mentoring hours and 10 hours of in-service annually. Staff will be on hand to provide daily oversight and escalation for problem solving so that volunteers are supported and are able to provide timely, accurate, and expert health insurance education. In addition to the federally supplied materials, PCOA makes an annual investment to develop detailed county-specific information which is essential to the volunteers' ability to assist Medicare recipients.

Ambassadors will receive a resource binder and will be required to attend an initial training session consisting of defining their role and responsibilities and familiarizing them with community resources for elders and those who assist them. The RSVP Director will lead monthly meetings to ensure

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volunteers are kept abreast of the changing environment of aging issues and resources and update their resource binder.

Supervisors at the remaining volunteer stations will directly train their volunteers.

Suicide Awareness and Prevention Training will be available for ALL RSVP volunteers assigned to all stations.

The RSVP Director will work in conjunction with PCOA staff to target outreach and recruitment to underserved communities and communities whose demographic information includes elders living on low income and in areas with barriers to accessing services, such as non-English speaking or poor access to transportation. Additionally, because the RSVP program and PCOA have an established relationship with a VISTA at the Tucson International Alliance of Refugee Communities (TIARC), outreach and recruitment efforts will be expanded to the refugee community.

Specific volunteer requests from RSVP volunteers will be advertised on Volunteer Match and PCOA's monthly publication newspaper Never Too Late. On-going recruitment for volunteers at PCOA and the neighborhood stations is through PCOA's website and staff presentations at health fairs and community meetings. Independently and through the Neighbors Care Alliance, stations staff at health fairs and community events will promote RSVP volunteer opportunities in an effort to recruit new volunteers and clients. Because of PCOA's long standing presence and recognition within the community, media requests are often made for appearances by PCOA and station leaders, resulting in new volunteers, clients, and donations. Newspaper coverage of RSVP activities has the same effect.

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Sustained outreach by PCOA to Hispanic communities has resulted in the start up of a station in a predominately Hispanic area of the county where many volunteers and elders speak Spanish as their language of preference. With this breakthrough, efforts will be on-going annually to recruit and train Latinos and Spanish-speaking volunteers.

Elders who enter the program as clients are encouraged to expand their participation by volunteering to provide services that are within their capabilities. For example, an elder who receives rides volunteers by making friendly telephone calls.

Liability insurance and a 10 cents a mile, 15 mile maximum mileage reimbursement is available for all volunteer activities. Due to the advocacy efforts of PCOA's CEO, a separate reimbursement will be available through the Pima Association of Governments/Regional Transportation Authority Volunteer Transit Service to volunteer drivers at the station sites. The PCOA administered PAG/RTA VTS funding reimburses volunteer mileage for transportation and errand services up to the Federal business rate which is currently 55.5 cents a mile and volunteers may not claim both the RSVP and PAG/RTA VTS reimbursement. Mileage reimbursement is crucial for many fixed income RSVP volunteer drivers, especially those who are providing rides in the lower income and rural areas. It provides a cost effective way of recruiting and retaining volunteers who provide much needed transportation services to ensure that elders are able to remain safely in their homes for as long as possible.

To aid in retention of volunteers, RSVP staff will have an open door policy for volunteer leaders to contact the Director for any and all issues. All volunteers with concerns will be able to contact the Administrative Aide. To aid retention, a quarterly volunteer satisfaction survey and a semi-annual

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station leader survey (developed by the RSVP Advisory Council Evaluation Committee) will be administered. The RSVP Director and Advisory Council will analyze the survey results and decide what steps to take to ensure volunteer satisfaction. The RSVP Director will make sure action is taken.

PCOA will host an annual recognition event for all the RSVP volunteers which will be attended by PCOA's CEO, staff and local dignitaries. Particular recognition will be given to volunteers with long service and/or significant volunteer hours. Also, PCOA's Never Too Late publication recognizes significant contributions by individual volunteers. The neighborhood stations will plan and provide additional recognition for their individual volunteers which will be attended by RSVP and PCOA staff.

Program Management

The RSVP program will be in compliance with Corporation regulations and policies by ensuring that: volunteer station status is a public or non-profit organization, a signed Memorandum of Understanding (MOU) is in place and every 3 years and contains provisions that RSVP regulations will be followed, such as prohibition of discrimination, reporting and evaluation processes for volunteers and stations, insurance coverage, mileage reimbursement and station support for RSVP volunteers.

An annual safety check ensuring the safety of volunteers that is in compliance with program regulations will be conducted by RSVP Advisory Council Members. An assessment questionnaire will be sent to all stations for compliance of handicap accessibility regulations and the RSVP Advisory council will do follow-up on making sure that all forms are returned.

PCOA's high visibility attracts interest and inquiries from communities and organizations wishing to participate as an RSVP station. RSVP materials are distributed by PCOA and RSVP volunteers at number events held throughout the county. RSVP responds to and follows up with all inquiries.

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Consultation is provided for as long as it takes to establish a new station.

To manage the stations, the RSVP director will conduct annual visits to evaluate site compliance to RSVP regulations. If necessary, corrective action is taken and may include updating the MOU.

PCOA'S RSVP has experience in graduating RSVP stations. At the end of each grant cycle RSVP director will conduct an annual review analyzing community need, activities and the number of volunteers at each station. Stations identified for graduation will be sent a letter outlining the graduation process and volunteers will receive a letter giving them the opportunity to move to another station.

Instruments for collection outcome and outputs are currently in place and we be reviewed annually for compliance.

The planning, training, coordinating, monitoring, and funding required to administer a complex system that serves thousands of individuals each year requires the integration of multiple funding sources. The programs and services funded by PCOA, which are non-entitlement services, are supported by a variety of different sources ranging from public funds-federal, state, county, and city, to private funds -- grants, bequests, endowments, memberships, donations, and project income and cost-shares. PCOA has experienced and professional staff in the areas of financial management, management information system technologies, fund development, and grants and program administration that work together to meet not only DES contract requirements but also to be accountable to all funders and the public. The PCOA Finance Department tracks all PCOA revenues and expenditures by program and funding source. Financial records are maintained on Sage MIP

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Fund Accounting software, with a chart of accounts set up by general ledger account code, program code and grant/funding source code. In addition, Excel spreadsheets are maintained to track and monitor the budgets and billings for all funding sources. PCOA's finances are reviewed annually by an independent auditing firm and reports presented to the Board of Directors and sent to all funding sources. The RSVP program director receives monthly, quarterly and yearly reports, works closely with the finance department to ensure that RSVP expenditures are spent appropriately.

Organizational Capability

PCOA has administered the local RSVP for the past 37 years and is experienced in developing successful community-wide partnerships and collaborations addressing issues relevant and specific to Pima County elders. Additionally, PCOA has experienced and professional staff in the areas of financial management, management information system technologies, fund development, and grants and program administration that work together to meet not only DES contract requirements but also to be accountable to all funders and the public. The PCOA Finance Department tracks all PCOA revenues and expenditures by program and funding source. Financial records are maintained on Sage MIP Fund Accounting software, with a chart of accounts set up by general ledger account code, program code and grant/funding source code. In addition, Excel spreadsheets will be maintained to track and monitor the budgets and billings for all RSVP funding sources. PCOA's finances are reviewed annually by an independent auditing firm and reports presented to the Board of Directors and sent to all funding sources.

The RSVP program director will receive monthly, quarterly and yearly reports, and will work closely with the finance department to ensure that RSVP expenditures are spent appropriately. With oversight from the CEO and CFO, the RSVP Director will track and monitor program and complete quarterly and annual reports as required.

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PCOA already has a system in place to adequately administer such programs, provide accountability and outcome reporting and fair application of the funds. There are individual volunteer application forms that collect additional information from volunteers who would be driving clients, reporting forms designed to capture the information necessary to document and track these kinds of services, insurance contracts in place for those volunteers 55+ and the capacity to complete the financial transactions with the volunteer stations.

The RSVP program will support 2 full time staff--a Program Director and an Administrative Assistant--with additional PCOA support from the Community Relations Director (8%), Finance Manager (3%), 2 accountants (7% total) and receptionist (2%).

The RSVP Program Director has been with the RSVP program since 1973 and assumed the director position in 1985. The Director has responsibility for volunteer recruitment, placement and training, fiscal management, review and evaluation of outcomes, community presentations, reporting and coordinating special projects with local CNCS programs. Currently, the Administrative Aide has more than 9 years of experience and is responsible for data management, volunteer referrals and project support. She attends trainings as needed to support her in her position. The Community Relations Director brings 10 years of management experience and 3 years experience in outreach and working with the Neighbors Care volunteer stations. The Community Relations Director provides support with grant writing, project development and advocacy.

The project is further supported by PCOA's Outreach Coordinators, Information Technology staff, Family Caregiver Specialists, Development Director, Human Resources director, Community Relations Director, Public Relations Director, Chief Executive Officer. Each responds to requests for support with outreach, volunteer training, technical assistance, fundraising, resource development,

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media releases, and community presentations.

PCOA was founded as the Tucson Council on Aging in 1967. From 1971-1976, PCOA developed one of the first case management services for the elderly in the United States, which is now become the Community Services System. In 1972, PCOA was designated to serve as the Area Agency on Aging (AAA) for Region II (Pima County) by the Pima Association of Governments, the local metropolitan planning organization. That same year PCOA developed a plan for long term care for Pima County's senior services system. PCOA serves as a visible advocate and focal point for the development and delivery of a comprehensive service delivery system, which reflects the needs of elderly residents of Pima County. For 45 years PCOA has continued to coordinate and plan with other agencies and organizations to promote new or expanded benefits and maintain existing services especially in times of increased needs and shrinking resources.

PCOA provides family caregiver support services, Medicare insurance counseling, financial literacy assistance, case management services, suicide prevention training, long-term advocates, elder rights and benefits assistance and the evidence based Arizona Living Well programs, as well as administering Community Services.

For those areas of need, where funding was insufficient or not available, PCOA developed 2 nationally recognized volunteer programs (National Council of Area Agencies on Aging and the Association of Area Agencies on Aging) and has managed them successfully for more than 10 years. Both these programs, Ambassadors and the Neighbors Care Alliance, depend heavily on RSVP volunteers.

PCOA has 46 years of involvement with seniors and 37 years developing and managing volunteer

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programs and more than 10 years of experience identifying and using impact-based outcomes. PCOA completes on-time reports to local foundations and corporations, and City, County, State and Federal funders as required. It monitors contracts with community agencies, adhering to best practices from the federal government and nationally funded organizations.

PCOA's has high recognition and credibility among elders, caregivers, government officials, other agencies, private corporations. During funding shortfalls, PCOA's community appeals have resulted in significant donations to bridge the gap.

PCOA currently owns the building from which most of our services are delivered and has maintained a presence in two community offices for 3 years, sharing space with a local performing arts center and a senior center. Offices are fully equipped with a newly installed phone system and a plan to replace computer and other electronic equipment on a rotating basis.

RSVP operates under PCOA's policies and management supervision. PCOA recently completed a four day audit by the state Department of Economic Security's Division of Aging & Adult Services. During the exit interview, state staff complimented both PCOA's Finance and Human Resources departments as the best they have audited in the state. Human Resources director keeps the Policy and Procedures manual up-to-date, including a schedule of training on key personnel policies such as workplace violence, sexual harassment and "whistle blower". The Human Resources director monitors a calendar of annual reviews for all staff and managers. PCOA's CFO has oversight for developing, training and reviewing purchasing procedures. Workplace is informal, promoting questions and ensuring that purchase order forms are completed correctly.

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In addition to PCOA's Advisory Council (composed of interested community individuals), PCOA also convenes the RSVP Advisory Council. It is made up of 10 community members and RSVP volunteers which meet 5 times per year to advise the RSVP director on policy and procedures for volunteers and volunteer sites, to develop resources for recognition events and to participate in special forums focused on community issues affecting the volunteers. Advisory Council members receive ongoing orientation to the Strategic Initiatives of the CNS. PCOA's Community Relations Director attends the council meetings, providing agency updates and informing the council about issues concerning our senior population, funding and agency activities. The feedback from the RSVP Advisory Council has been very positive about being kept informed and updated in this way.

PCOA has approximately 40 different funding sources the majority of which is federal grant-related and has had significant federal grant funding for over 40 years.

PCOA's Chief Financial Officer has 26 years of experience managing federal, state, local and funds. Department directors submit semi-annual reports, addressing strategic and operational objectives, to the PCOA Board. Employees have annual performance reviews. Organizational policies and procedures are well developed and conform to local state and federal standards. The Human Resources Department keeps personnel policies and procedures current. All employees have well defined position descriptions. PCOA's Board of Directors is deeply involved in the development of the three year strategic plan which includes a plan for RSVP volunteers.

PCOA's RSVP program is well recognized and respected in the community. As significant portion of the 30% match comes from the Pima County Department of Community Development and Neighborhood Conservation and the United Way of Tucson and Southern Arizona. These two organizations have provided strong support for the RSVP program since its inception. Because of PCOA's reputation and effectiveness in the community, the development department is successful in

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raising funds from other sources such as private and non-profit corporations and individual donors.

Since 1973 PCOA has always met its share of the match.

other

N/A

PNS Amendment (if applicable)

N/A