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## **Narratives**

### **Executive Summary**

The Escambia County RSVP has operated in rural Escambia County in southwest Alabama, population 38,319, since 1973 and approximately 8 years under its current sponsor, the South Alabama Regional Planning Commission. RSVP estimates 81 unduplicated volunteers will serve in Escambia County such that 31% will be placed in its Primary Focus Area of Healthy Futures; 46% will be placed in the focus areas of Education, Economic Opportunity, Disaster Services, Veterans and Military Families, and Capacity Building; and 23% in Other Community Priorities. A total of 24% of unduplicated CNCS volunteers will provide Outcome based services in Healthy Futures and Education, producing estimated outcomes that 30 volunteers and youth will report receiving better, safe and nutritious food supply and develop a more active and healthier lifestyle; and 150 K-3 students will receive tutoring/coaching and at least 60 will increase reading comprehension. Community Gardens outcome will increase food security and reading buddies will be placed in Escambia County Title I schools with outcomes of increased reading comprehension.

Some 3,900 youth, seniors, disabled and veterans will be served through RSVP volunteers. Volunteers will assist State Health Insurance Program provide information on health insurance, health care access and health benefit programs; and teach health education classes. Other RSVP volunteer activities include Tax Counseling for the Elderly, transportation for veterans, disaster preparedness, capacity building with fundraising for Alzheimer's-Dementia services, and other community priorities of senior centers and Project Lifesaver Tracking bracelets. Volunteer Stations include Coalition for a Healthier Escambia County, Veterans Affairs, Escambia County School System, Area Agency on Aging, Sherriff's Department, libraries, senior centers and the Poarch Creek Indians. The CNCS investment of \$37,442 will be supplemented by \$38,538.00 in other resources.

### **Strengthening Communities**

Healthy Futures

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Escambia County Alabama is located in Southeast Alabama and is a largely rural county which includes Alabama's only federally recognized Indian Tribe, the Poarch Band of Creek Indians.

There are an estimated 38,319 residents of Escambia County Alabama including 5,437 residents 65 years and older and 732 grandparents responsible for their own grandchildren under 18 years of age.

The diversity of the area roughly includes 63% white, 32% African-American, 4% American Indian, 1% Hispanic/Latino with the median age of 38. The median household income is \$32,321 with 22.8% of individuals below poverty level.

According to the Alabama Department of Senior Services and the Area Agency on Aging of the South Alabama Regional Planning Commission (AAA-SARPC), the most recent needs assessment showed the top three services ranked as most important by seniors in Escambia, Baldwin and Mobile Counties in South Alabama were: 1) Nursing care or physical therapy at home; 2) Information on diseases and health problems; and 3) Information on keeping a healthy mind. The top three personal barriers reported were: 1) Poor health or mobility; 2) Lack of transportation; and 3) Loss of financial security.

When professionals in aging and disability were surveyed the top needs reported were: 1) Transportation for people who no longer drive or cannot use public transportation; 2) Personal care for those with limitations of daily living and 3) Quality, affordable health care. The top three service barriers reported by professionals were: 1) Long waiting lists/insufficient funding for programs and services; 2) Cumbersome/lengthy eligibility determination process or bureaucratic barriers that inhibit organizations from providing services; and 3) the lack of volunteers.

Based on information from the Alabama Department of Public Health (ADPH), the health status of many adults in the state is being compromised by lifestyle choices. The major health risks for the older population include obesity, physical inactivity, high blood pressure, high cholesterol levels, poor nutrition, and tobacco use and exposure (Alabama Department of Senior Services 2011 -- 2012 State Plan on Aging).

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The leading causes of deaths in Escambia County are heart disease, cancers, accidents, chronic lower respiratory disease and diabetes. The life expectancy rate in Escambia County is 74.7 years compared to 75.5 years for Alabama and 76.5 years for the United States. Like other black belt counties in Alabama, as compared to the U.S, residents have higher rates of obesity, hypertension, strokes, diabetes and their related medical impacts. The 2000 US Census indicates 47.4% of persons age 60+ in Escambia County have a disability. The Escambia County RSVP has a primary focus area of healthy futures to help strengthen the local community to help address these major causes of disability and death; and the community needs assessments that indicated the need for information on health issues, access to affordable, quality health care, and the need for volunteers. Volunteer activities will focus on reducing childhood obesity, increasing access to nutritious food, and increasing access to health care, including health education.

Escambia County is a low-income, low education, low food security, rural area with limited activities, resources and outcomes that involve a food system to get food from field to plate. Multiple national studies have indicated Alabama is in the top ten of the most food insecure states. There are no known cost free community-wide programs for senior adults and youth to access adequate, safe, and nutritious food for an active and healthy life. Thirty Six percent of children in Alabama are considered either overweight or obese and this rate has increased since 2003 (National Initiative for Children's Healthcare Quality NICHQ). Robin Griffin, local middle school nurse, conducted a BMI on 303 students and 20% of the students tested BMI's were at 25 or higher making them overweight. One student's BMI was 44 making them at a very high risk of diabetes, high blood pressure, and heart problems. Ms. Griffin stated childhood obesity was a huge problem for the county. "The causes of childhood obesity are not difficult to understand," says Dr. Bob Keith, an Alabama Cooperative Extension System nutritionist. "Basically we have two things going against kids: a plentiful supply of food, which often tends to be high in calories and full of fat and sugar, and a lack of physical activity"

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(ACES Newslines [www.aces.edu](http://www.aces.edu)). RSVP will support Michelle Obama's initiative to fight childhood obesity through RSVP volunteers and youth (intergenerational stewards) and the community through a county-wide community garden program.

To address the priority community need, RSVP has collaborated with the Coalition for a Healthier Escambia County to support community gardens to promote healthy behaviors such as eating more fruits and vegetables, increased exercise, and increased access to affordable fresh vegetables and fruits. RSVP volunteers will also expand these efforts by increasing families' ability to afford fresh produce through helping individuals and families obtain farmers' market vouchers and SNAP benefits for food assistance.

RSVP has been asked to take the lead on the community gardens volunteer mobilization by the Volunteer Station, the Coalition for a Healthier Escambia County; and therefore works closely with all volunteers and community partners. This has made the community garden stations an opportunity to obtain outcome based data on improvements in food security among the RSVP volunteers and the larger group of youth volunteering at the gardens. This activity, H11 has the National Performance Measure outcome of H12.

In addition to facing economic struggles and food insecurity, many older adults also struggle with poor health. According to the 2010 National Health Interview Survey, 85% of those aged 60+ have one or more chronic conditions--such as diabetes, arthritis, cancer, or heart disease. The 2000 US Census indicates 72.7% of Escambia County have a known physical illness. These conditions often result in higher health care costs, and sometimes lead to limitations in daily activities.

To address the major causes of death and disability in Escambia County, the South Alabama Regional Planning Commission-Area Agency on Aging (AAA/SARPC) has also begun the "Chronic Disease Self-Management Program" which addresses the major chronic diseases and "A Matter of Balance" fall prevention program to address disability and death related to accidental falls. These evidence

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based health education programs utilized trained community volunteers to conduct the classes.

Evidence-based programs offer proven ways to promote health and prevent disease among older adults. The Center for Healthy Aging encourages and assists community-based organizations serving older adults to develop and implement these programs. Evidence-based programs are based on research. When you implement one, you can be confident you're delivering a program that works.

Evidence-based programming translates tested program models or interventions into practical, effective community programs that can provide proven health benefits to participants.

The "Chronic Disease Self-Management Program" is designed to enhance regular treatment and disease-specific education such as 'Better Breathers', cardiac rehabilitation, or diabetes instruction. In addition, many people have more than one chronic condition. The program is especially helpful for these people, as it gives them the skills to coordinate all the things needed to manage their health, as well as to help them keep active in their lives.

Living Well Alabama, the "Chronic Disease Self-Management Program" is a workshop given two and a half hours, once a week, for six weeks, in community settings such as senior centers, churches, libraries and hospitals. People with different chronic health problems attend together. Workshops are facilitated by two trained leaders, one or both of whom are non-health professionals with chronic diseases themselves. RSVP will recruit volunteers to serve to become trained leaders and to conduct classes.

Over 1,000 people with heart disease, lung disease, stroke or arthritis participated in a randomized, controlled test of the Program, and were followed for up to three years. Stanford University looked for changes in many areas: health status (disability, social/role limitations, pain and physical discomfort, energy/fatigue, shortness of breath, psychological well-being/distress, depression, health distress, self-rated general health), health care utilization (visits to physicians, visits to emergency department, hospital stays, and nights in hospital), self-efficacy (confidence to perform self-management

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behaviors, confidence to manage disease in general, confidence to achieve outcomes), and self-management behaviors (exercise, cognitive symptom management, mental stress management/relaxation, use of community resources, communication with physician, and advance directives).

Subjects who took the "Chronic Disease Self-Management Program", when compared to those who did not, demonstrated significant improvements in exercise, cognitive symptom management, communication with physicians, self-reported general health, health distress, fatigue, disability, and social/role activities limitations. They also spent fewer days in the hospital, and there was also a trend toward fewer outpatients visits and hospitalizations. This data yielded a cost to savings ratio of approximately 1:4. Many of these results persist for as long as three years.

A "Matter of Balance" emphasizes practical strategies to reduce fear of falling and increase activity levels. Participants learn to view falls and fear of falling as controllable, set realistic goals to increase activity, change their environment to reduce fall risk factors, and exercise to increase strength and balance. This program has been adapted from the original intervention to be more suitable for community-dwelling older adults by allowing small group sessions to be led by a trained facilitator. "A Matter of Balance" includes eight two-hour sessions for a small group led by a trained facilitator. These "coaches" are volunteer lay leaders that have been trained to conduct the classes.

A randomized, single-blind controlled trial was conducted to test the efficacy of a community-based group intervention to reduce fear of falling and associated restrictions in activity levels among older adults. A sample of 434 persons age 60+ years, who reported fear of falling and associated activity restriction, was recruited from 40 senior housing sites in the Boston metropolitan area. Data was collected at baseline, and at six-week, six-month, and 12-month follow-ups. Compared with contact control subjects, intervention subjects reported increased levels of intended activity and greater mobility control immediately after the intervention. Effects at 12 months included improved social

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function and mobility range.

A subsequent study examined whether "A Matter of Balance" could be translated into a community-based volunteer lay leader model and achieves outcomes comparable to those found in the randomized controlled test. A repeated-measures, single group design was employed. Participants experienced significant increases in Falls Efficacy, Falls Management, and Falls Control at six weeks, six months, and 12 months, thus achieving comparable outcomes with those of participants in the randomized controlled test.

Managing chronic conditions is more difficult without adequate access to affordable health care. A core set of benefits is available to low-income older adults (as well as younger adults with disabilities who receive Medicare) that can enable them to obtain access to needed health care through Medicare and Medicaid, including community-based long-term care. Unfortunately a high percentage of the elderly and disabled are unaware of help that is available. The National Council on Aging estimates that 18% of the elderly and disabled eligible for Medicaid have not applied for benefits; 38% of Medicare beneficiaries eligible for Medicare's Low Income Subsidy, (which subsidizes the costs of prescription medications by lowering deductibles and copayments), have not enrolled in this benefit; and 26% of Medicare beneficiaries eligible for Medicare Savings Programs, (which helps with Medicare premiums, deductibles and copayments), have not enrolled in this program.

As the sponsor's Area Agency on Aging manages the Evidence Based Health Education/Promotion classes described, it serves as a very structured volunteer station to provide volunteer training, assignment management, and to obtain needed information for output H4 to document the number of people participating in health education classes.

The Centers for Medicare and Medicaid Services (CMS) funds the State Health Insurance Program (SHIP), which provides insurance counseling on Medicare and Medicaid benefits in each state. In Alabama SHIP is managed through the regional Area Agencies on Aging. Much of the outreach and

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beneficiary assistance is provided through volunteers. RSVP volunteers will be trained by the local SHIP at the South Alabama Regional Planning Commission-Area Agency on Aging (AAA-SARPC) to serve residents of Escambia County to provide education and outreach on using the preventative benefits under Medicare, and to screen and help eligible persons apply for Medicare Savings Programs, Low Income Subsidy and Medicaid.

The Centers for Medicare and Medicaid Services (CMS) designates areas of unmet need per zip code as tiers. Brewton continues to be a tier 1 community for the Escambia county area. The tier 1 zip codes are areas where CMS identifies a high unmet need area of beneficiaries who are eligible for Low Income Subsidy (LIS) for Medicare Part D prescription benefits, but they are not enrolled in the program. Brewton has 198 Medicare beneficiaries CMS states are LIS eligible, but not enrolled. LIS helps to substantially lower prescription drug costs, thereby increasing affordability and access to prescription medications. SHIP has broadened its base in the City of Brewton by adding support personnel to educate the community and inform residents of the value of the 'Extra Help' program as well as the Medicare Savings Program through the Escambia County RSVP and volunteers. SHIP has also partnered with the Benefit Enrollment Center to conduct screenings in the tier 1 area in Escambia County to increase access to Medicare Savings Programs and Low Income Subsidy.

The benefit screenings provided through the SHIP program will also include screening for SNAP benefits, and Farmer's Market vouchers which are used to purchase fresh local product, to help increase access to fruits and vegetables and nutritious foods. According to the National Council on aging, food insecurity is much higher among older adults (16%) than the general older population (6%) and older adults have the lowest participation rate among all age groups in SNAP, with some 61% eligible for benefits that they are not accessing. And with the average SNAP benefit for seniors living alone estimated at \$119 a month or \$1,428 annually, this benefit could significantly impact food insecurity. Seniors often qualify for higher benefits due to their medical expenses. Escambia County

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is similar to other rural black belt counties in Alabama with higher poverty and disability rates; with 23.6% of persons age 60 and over at 125% of poverty and 44.7% at 200% of poverty.

As the sponsor's Area Agency on Aging manages the State Health Insurance Program, it serves as a very structured volunteer station to provide volunteer training, management and to obtain service activity for output H2, the number of people whom information on health insurance, health care access and health benefits is delivered.

In addition to the Healthy Futures Focus area, Veterans and Military Families will be served by providing volunteers to transport veterans to VA medical centers in Pensacola, Biloxi and Montgomery. This is the number one unmet volunteer need identified by the local Veterans' Affairs Office in Escambia County and transportation is among the top three needs identified by seniors and professionals who serve seniors in recent surveys.

RSVP will directly assign volunteer drivers referred by the volunteer station, the Veteran's Administration. and reports output V1 on the number of veterans receiving assistance through the Volunteer Works reporting system on a monthly basis.

### **Recruitment and Development**

To assure a high quality experience for volunteers that is engaging and impacting; RSVP utilizes the Resource Center on the CNCS website and the Senior Corps Listserve to get examples of volunteering opportunities that work, as well as strive to incorporate CNCS strategic focus areas for volunteering. A question on the volunteer enrollment form asks the volunteer to share any skills or interests they may have. This opens the door to discuss further with the volunteer about existing volunteer opportunities or possibly adding a new volunteer opportunity. Emphasis is placed on discussing focus area opportunities with volunteers. Talking to a new volunteer about their interest is how RSVP got engaged on the community garden project. When the volunteer finds a volunteer service on the list of opportunities offered that interests them; RSVP will go over the Position Description with the

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volunteer that gives examples of service and qualifications needed for this volunteer service. If a volunteer states they have never had experience in service area but always wanted to provide this service; RSVP will work with the volunteer to obtain needed training and orientation to make them an effective volunteer at the station that interests them to serve the community. Opportunities to build leadership skills come through our sponsor, the South Alabama Regional Planning Commission-Area Agency on Aging (AAA-SARPC) that serves as the regional Area Agency on Aging, which conducts an annual Legacy Leadership Institute for Older Adults. It is a particularly effective method to engage baby boomers and men. This institute provides a week of class held at the University of South Alabama; that builds on the multiple skills retirees bring to volunteerism and their wish to make a difference in their community. Volunteers are also encouraged to lead committees or groups such as the Lead Volunteer for the community garden projects. These Lead volunteers make suggestions on best practices for the volunteers to work in the community gardens in order to sustain the gardens for future generations and then discuss with the volunteers these suggestions. Volunteers share their service experience, during the annual Legislation Day in Montgomery, with their State Senator and Representatives; they are encouraged to share with their peers during special events such as the MLK Day of Service or the Senior Expo. Their stories will be a part of the electronic newsletter as well as incorporated into presentations to interested organizations or groups. An annual volunteer survey helps RSVP evaluate if the volunteer's skills have been enhanced or increased and their quality of life has been enhanced. A husband and wife community garden volunteers stated before they started volunteering with RSVP, they would go to the nutrition center, then go home and stare at their walls. Now, they have more of a reason to get out of the house and are happy they can be a part of a community project. RSVP recruits through Volunteer Match, AARP's Create the Good, RSVP monthly electronic newsletter, Area Agency on Aging website, participating in volunteer fairs, public presentations, radio and radio talk shows, other volunteers and through partner agencies that help

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promote the RSVP program. Currently RSVP has 76 active volunteers with a 75% retention rate. To retain active volunteers, RSVP staff communicates with the volunteers either at the volunteer station, via email or by telephone at least once a month. Birthday, Get Well, and Sympathy cards are sent to the volunteers to let them know they are important to RSVP. RSVP hosts an annual recognition banquet and other types of recognitions throughout the year by holding meetings and social functions such as Senior Corps Week. The sponsor, Volunteer Station Managers, County Commissioners, Mayors, State Senator and Representatives, and partnering agencies are all invited to attend the annual banquet to honor the volunteers. The Legacy Leadership Institute for Older Adults graduates attends a banquet style graduation ceremony. The Volunteer Stations recognize the volunteers at least once a year with a card, a lunch, small gift, etc. Highlights of volunteer activities are made known through the media. The newspapers are invited to attend RSVP events or articles with pictures are sent to the newspapers. RSVP emails or faxes the radio stations information about the event to be aired, and makes sure the federal, state, and local leaders are aware of what RSVP volunteers have done for the community. RSVP staff attends the annual National Conference on Volunteering as well as webinars and conference calls that provide training and technical assistance. The on-line Resource Center at CNS.gov is utilized to better equip RSVP for training volunteers, volunteer station supervisors, and advisory council members. A new volunteer receives an RSVP handbook and a brief training on the contents of the handbook that includes using timesheets, privacy and confidentiality, and codes of conduct. When completing a Memorandum of Understanding and Volunteer Position Description with a new volunteer station manager, RSVP staff discusses the value of the volunteers and volunteer timesheets. RSVP endeavors to host half-day trainings for volunteer station supervisors, volunteers, and advisory council members once a year. The training is provided by RSVP staff that covers the program design including mission statement, brief history of RSVP, organizational chart, funding of the program, highlights of the grant and RSVP volunteer hand book.

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There are two or three guest speakers to talk about volunteering opportunities for their program or other training they can provide to volunteers such as the Legacy Leadership for Older Adults, becoming a lay leader for the evidence based health promotion classes, enhancing gardening skills through the Cooperative Extension Service or Master Garden presentations, State Health Insurance Program volunteer counselor training, benefit enrollment center volunteer training, IRS tax preparer training, or AARP driver safety classes. These training are provided free of charge to volunteers by other organizations and by the sponsor and most trainings are provided through national models such as those from Stanford University, the University of Maine, the National Council on Aging, U.S. Administration on Aging, Centers for Medicare and Medicaid services, Auburn University Extension Service, Centers for Disease Control, Alabama Department of Public Health and the IRS. Most of these trainings result in recognition by the State or national bodies that the volunteers are certified to provide a skilled service, such as teaching the "Chronic Disease Self Management" classes, "A Matter of Balance" Fall Prevention (both evidence based interventions), State Health Insurance counseling, assist with outreach about Medicare's preventive health benefits, Medicare Savings Programs and Low Income Subsidy, tax preparation, and access to Medicaid, SNAP and Farmer's Market coupons. RSVP calls on the Alabama Cooperative Extension Agents for informational materials and their professional skills in developing and maintaining community gardens and educating on healthy eating. The Escambia County Sheriff's office provides free local background checks for volunteers and donates security whistles to hand out during events such as disaster preparedness.

The Legacy Leadership Institute provides a vehicle for volunteers to partner with other volunteers to address priority community concerns and build capacity. A recent example is the 2012 class of the Legacy Leadership establishing an Alzheimer's-Dementia Helpline for South Alabama.

RSVP plans on a workshop for the advisory council to see where RSVP is now and where it needs to go in the future to address national priority focus areas and local community needs. RSVP plans a

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Train the Trainer event for volunteers to lead trainings for volunteers and volunteer station managers.

RSVP staff plans on continuing to attend webinars offered by CNCS and any local workshops or conferences to further training on managing volunteers and community groups.

RSVP is an equal opportunity volunteer agency including those with disabilities and currently has 76 active volunteers with 55 white, 16 African-American, 1 Native American, 1 Hispanic, 1 Vietnamese, 1 Asian Pacific, and 1 of German decent. This is representative of the larger community. There are 52 female, 24 male and the average age of the volunteers is 74 with the youngest volunteer age 59 and oldest volunteer age 93. RSVP volunteers rely on social security as their only income and others have retirement (including military retirement) or are still working, some are not high school graduates while others have college degrees, and they come from many occupations. A significant number of volunteers have chronic illnesses and disabilities, and age related disabilities, but they continue to volunteer in meaningful ways. Many of the male volunteers are veterans. RSVP brings diversity together through community gardens that enhance opportunity for people of diverse backgrounds to work together collaboratively to help improve the community's health and bring back community pride. The Area Agency on Aging's Legacy Leadership Institute for Older Adults brings volunteers from all walks of life, race, and ethnicity together to improve their community's disaster relief efforts and wellbeing. Along with a grant from the Internal Revenue Service; the RSVP's Tax Counseling for the Elderly program (TCE) allows RSVP to partner and serve the Poarch Creek Indians with the tribe providing space, office equipment, and internet service for the program.

### **Program Management**

RSVP factors in needs assessments completed by the State and County, the needs of the community, CNCS national priorities, and the needs of the volunteers to bring about a work plan for volunteers to be assigned to serve at volunteer stations. RSVP looks at the community needs by viewing needs assessments compiled by the Alabama Department of Senior Services (ADSS), the sponsor's Area

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Agency on Aging (AAA), the Alabama Department of Health (ADPH) and other sources, by attending meetings such as the Coalition for a Healthier Escambia County or networking with agencies or community leaders to find out the specific needs of the county. Volunteer Stations that address the Primary Focus Area of Healthy Futures includes the Community Garden with the Coalition for a Healthier Escambia County and the sponsor's Area Agency on Aging and its health promotion and evidence based health education classes, State Health Insurance Program and Benefit Enrollment Center. The Community Garden has some limited grant funding and RSVP volunteers have taken the lead to make this project a success and work hand in hand with the Coalition for a Healthier Escambia County, the Auburn Extension Service, and town of East Brewton and the City of Atmore. The Area Agency on Aging's State Health Insurance Program and its Benefit Enrollment Center rely heavily on trained volunteers through grant funded initiatives that provide volunteer training resources, and impact based reporting systems. The structures in place for these initiatives and substantial expertise and resources of the sponsor's Area Agency on Aging make these stations strong viable and outcome based projects. These Primary Focus Area stations are the most reliable reporters for data needed for national performance measure outcomes and outputs so that needed data can be collected and measured.

The Escambia County RSVP is staffed with a full time director and a full time volunteer coordinator. Given the strength of the Primary Focus Area stations, staff is able to also successfully manage the volunteer stations outside the Primary Focus Area. Economic Opportunity is supported by the sponsor's IRS Tax Counseling for the Elderly program to provide volunteer stipends and the IRS provides a way to capture the data needed for the outcome measures; the schools are reliable stations for the Education Focus Area and do the necessary standardized testing to show outcomes and performance measures; and RSVP has an ongoing relationship with the American Red Cross as a station due to the importance of disaster planning and services given the proximity of Escambia

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County to the gulf coast and annual hurricane threats. Locally the Veteran's Administration will serve as a station for veterans who need transportation to nearby cities which offer veterans medical care. Potential volunteer stations call our RSVP office seeking volunteers or a volunteer will request a volunteer service. One example would be: An advisory council member, who is the At Risk Officer for the county school system, requested volunteer service at W. S. Neal Elementary School to help students struggling with their Alabama Reading Initiative books as well as with the Truancy Diversion program for Junior High and High School students. RSVP has also been asked to work with ADPH Scale Back Alabama Initiative. The RSVP director works with the volunteer station manager to develop an agreed upon Memorandum of Understanding (MOU) and a Volunteer Position Description. Once the MOU is signed by the volunteer station manager and RSVP director; the volunteer coordinator uses the volunteer position description to recruit volunteers and make sure the volunteer station has copies of the signed MOU, volunteer position description, and timesheets. On a monthly basis, the volunteer coordinator contacts volunteer stations to get signed volunteer timesheets and checks with them on the volunteer service. Every quarter, the volunteer coordinator checks the volunteer file to make sure all paperwork is up to date including the Volunteer Position Description and talks to the volunteers about their assignment(s). Once a year, either the director or volunteer coordinator updates the MOU with the volunteer station manager. The director with the help of the volunteer coordinator prepares a progress report for CNCS. This progress report helps determine the impact the program had on the community. To assure all goals and objectives are met and result in a high quality project, the RSVP advisory council along with the AmeriCorps VISTA volunteers will assist in an annual assessment of the program as a whole by using a section of the RSVP Project Self-Assessment Checklist from the handbook as the assessment tool. This assessment will be given to organizations, groups, and community leaders familiar with the RSVP program and an advisory council member will compile the results. The RSVP project director with the assistance of

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the volunteer coordinator and VISTA volunteer will conduct annual surveys of volunteer stations and volunteers to assure the program addresses specified community needs and provide meaningful placements for the volunteers. In so doing, RSVP volunteer activities are directed toward impact-based activities. Specific outcomes are monitored as delineated in the work plans for the Primary Focus Area and other outcome based work plans. The annual volunteer surveys will be completed during annual volunteer recognition event. RSVP seeks the advice of the Area Agency on Aging (AAA) director as well as CNCS state specialist to develop and manage volunteer stations and volunteer assignments as well. The volunteer coordinator collects timesheets from volunteer stations every month and inputs the data into Volunteer Works software to demonstrate the concrete impacts of the project and volunteers. The director tracks the information at least quarterly to measure progress towards stated objectives and outcomes, with adjustments made as necessary as part of continuous quality improvement and monitoring.

Since becoming a sponsor some eight years ago when impact based emphasis had begun with CNCS, the South Alabama Regional Planning Commission-Area Agency on Aging (AAA/SARPC) has sought to increase the focus of volunteer activities on impact based projects. As such there is not a need to graduate a significant number of stations as this has occurred slowly over the past several years. Volunteers from graduated volunteer stations have largely moved to another assignment or have become involved in capacity building activities.

Project resources, including in-kind, are managed with the assistance of the sponsor's fiscal office that has an Accounts Receivable and Accounts Payable department. All non-federal and cash, including in-kind cash resources, are received by the South Alabama Regional Planning Commission's (SARPC) fiscal office. They deposit the resources into the RSVP account; expend the money as directed by the AAA director and grants manager and account for resources by dispersing a monthly Revenue and Expenditure Report along with a Detailed Cost Summary Report and keeping all original receipts. The

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fiscal office keeps separate accounting records for different grants and awards including CNCS grant award for federal, non-federal, in-kind, and nonfederal excess funds. The AAA grants manager is responsible for managing the RSVP budget. The RSVP director keeps copies of all expenditures as well as tracks spending on the Quicken software. The Revenue and Expenditure Report along with a Detailed Cost Summary Report is sent to the RSVP director and the AAA's grants manager to review together and make any needed changes to the report. The cash and in-kind assistance from the County Commission and State funds assures assistance with nonfederal share. In order to ensure continued match, or if one resource is lost (especially in FY 2012), and to increase the match; the sponsor's Area Agency on Aging, RSVP advisory council, and VISTA volunteer will apply for grants and seek cash and/or in-kind donations from local foundations, organizations, businesses and CNCS Programming of National Significance grants. The cash and in-kind contributions from the Escambia County Commission assist in providing office space, utilities, telephone and janitorial service and insurance as well as some administrative costs of the program. Other cash and in-kind donations help with volunteer recognitions and insurance and pay for staff travel to conferences and workshops. An example of how resources enhanced program is the Healthy Community, Healthy Children grant that helped start and maintain community gardens, the Primary Focus Area and Outcome measure. The RSVP director sends requests for travel expenses or to purchase supplies for volunteer recognition and the office to the AAA director for approval, keeps all copies of expenditures sent to SARPC and tracks expenditures on the Quicken software.

### **Organizational Capability**

The sponsoring agency has sponsored RSVP for eight years and has experience in the program area since 1961. The South Alabama Regional Planning Commission (SARPC) staff includes a management team with the Director of Administrative Services and the Executive Director who provides oversight for purchasing, fiscal management, personnel matters and works with the

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Escambia County Commission that provides in-kind office facilities in Brewton and Atmore for the RSVP program. The Area Agency on Aging (AAA) director provides program administration and support and the AAA grants manager/accountant manages cash and in-kind program resources as outlined in the attached budget for RSVP. The AAA/SARPC serves as a central advocate and resource for the older adults in the region and provides planning services, evaluation of services, comments on programs and policies that impact older adults, provides coordination of services and technical assistance to communities, is a major source of funding for aging services in the region and provides certain services to include Aging and Disability Resource Center. SARPC has a close working relationship with local communities in its region and works on an ongoing basis with these communities to solve community problems. Experience with volunteer training, support and recognition has enabled AAA/SARPC to enjoy a diverse and stable volunteer pool. Because of AAA/SARPC past experience with volunteer service, assisting older adults, working with the community and community leaders; they have been a good match for RSVP and have helped the RSVP program grow.

The key management staff involved in program management is Julie McGee, the director for the AAA/SARPC. Mrs. McGee has a Master's Degree and is a licensed social worker with 30 years of professional experience, of which over 20 involved managing social service programs. Other staff includes AAA grants manager, Rita Thompson, an experienced accountant with a Bachelor's Degree. AAA director, grants manager, and RSVP director work collaboratively with development of grant application. Amy Cooley, RSVP director, holds a Bachelor's and Associate's degree and for seven years worked as a Medicaid Waiver Case Manager for the Elderly and Disabled program for AAA and for the elderly and disabled program at the Bay County Council on Aging. Charles Smith is the volunteer coordinator and has 16 years experience in human resources; four of these years were in the United States Air Force and he worked 8 years as an assistant manager. Because RSVP is a program for the

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community; each staff member possesses a background in working with a diverse group of people including older adults as well as working within a budget.

AAA/SARPC has managed a volunteer program for over thirty years and like many agencies that receive federal funds, has performance measures that must be monitored in all of its federally funded programs. The AAA/SARPC uses the Aging Information Management System (AIMS) for data collection and reporting to the Alabama Department of Senior Services (ADSS). Client satisfaction surveys have been conducted for selected programs. Annual goals and objectives are set and program plans are developed, monitored and adjusted as needed to provide accountability and ongoing quality improvement. The impact/outcome based programming required by the Corporation is in keeping with efforts established by the ADSS and The Administration on Aging (AOA). The AAA/SARPC is also an AmeriCorp VISTA

grantee and manages 12 VISTAs involved in impact based projects with measurable outcomes.

AAA/SARPC volunteer programs include Benefits Enrollment Center/Aging and Disability Center, State Health Insurance Program (SHIP), Senior Medicare Fraud, Long Term Care Ombudsman, Living Well Alabama, A Matter of Balance, Tax Counseling for the Elderly and the Legacy Leadership for Older Adults classes. The Area Agency on Aging has an Advisory Council to secure community participation and the Escambia County RSVP has a program specific county level RSVP Advisory Council for community participation. The list of the Escambia County Advisory Council is part of this application.

AAA/SARPC assists RSVP in the financial management of the grant from CNCS by receiving the grant money and keeping track of the spending of the money. The policies and procedures as well as departmental rules and responsibilities are as follows: for receipt of funds; the fiscal officer designates a person to make a duplicate copy of daily receipts of checks with one copy remaining with the fiscal officer and the other copy with the executive director. The designated person prepares deposit slips

## Narratives

with receipts deposited on the same day as received and no later than the end of the next banking day. The validated deposit slip will be reconciled by the executive director or his designated alternate immediately after depot is made. For purchases: purchases or commitments for supplies and equipment necessary for operation shall be made only by purchase order on a form completed by the designated secretary. Fifty-three percent of SARPC's annual budget comes from federal funds such as Administration on Aging (AOA), National Council on Aging (NCOA), Department of Transportation (DOT), Centers for Medicare/Medicaid Services (CMS), and the IRS. SARPC is assessed by multiple entities related to funded work projects; is audited annually and also receives audits by the state examiners. GAAP policies are employed including A133 audit.

The cash and in-kind assistance from the County Commission provides office space, utilities, telephone, internet service, fax line, copier, janitorial services and insurance. When RSVP needs any new equipment such as computer, printer, shredder, etc or supplies, AAA/SARPC will procure requested items for RSVP. The RSVP director sends a written request to purchase needed items for the program to the AAA/SARPC director and grant manager, once approved, a purchase order number is assigned and purchase is completed. AAA/SARPC personnel management support consists of the Director of Administrative Services and the Executive Director who provide oversight for purchasing, fiscal management, personnel matters. The AAA director oversees the planning and administration of the aging programs and the grant manager who oversees the administration of all grants for the programs. AAA/SARPC staff adheres to SARPC's employee guide for all policies and procedures including purchasing, travel, and personnel management support, and RSVP has an internal handbook closely based on SARPC's employee guide. Job descriptions for staff and administrators help define roles of each position and are addressed in the employee guide. Any travel outside the

## **Narratives**

AAA/SARPC region requires a Travel Request form. The travel request must be substantiated with adequate documentation for permission to travel and submitted to the executive director. Travel expenses to be reimbursed to the employee must be submitted.

The AAA/SARPC director and staff will evaluate the program on a quarterly basis by reviewing progress towards work plan objectives with particular emphasis on impact based plans. As part of continuing quality improvement, the AAA/SARPC director, in conjunction with RSVP director, will look at recruitment issues for each work plan, progress toward goals and objectives, challenges and successes. This process will be used to help direct resources, modify or develop new work plans, delete other plans, look for emerging opportunities to develop or enhance program and services, and modify activities to support the success of the project.

### **Other**

N/A

### **PNS Amendment (if applicable)**

N/A