

# Narratives

## Executive Summary

### Executive Summary

The mission of Mystic Valley Elder Services, sponsor of Middlesex County RSVP since 1996, is to support the right of elders and adults living with disabilities to live independently with dignity in a setting of their choice. Three hundred and seven (307) RSVP volunteers will provide services to alleviate long-term hunger, distribute information on health insurance, health care access, and health benefits, provide financial literacy, tutor at public schools, and serve meals at congregate meal sites. The Primary Focus Area of this project is Healthy Futures including Obesity and Food, Access to Care, and Aging in Place. The Other Focus Area of this project is Education with the objective of K-12 Success and a Community Priority of Congregate Meal Sites that enables RSVP volunteers to address the local unmet need of senior hunger and social isolation. At the end of the three year grant, 450 individuals will report increased food security after attending the food pantry 3 times or more, 31 homebound or older adults and individuals with disabilities will report having increased social support after 3 or more months of money management services, 595 students will have improved their academic performance in literacy after completing 5 or more months in the Reading Partners program, and 55,200 congregate meals will be supported by the RSVP volunteers. It is anticipated that the CNCS federal investment of \$74,897 will be supplemented by several non-federal resources, both repeat contributors with long-standing relationships with sponsor MVES as well as many newly cultivated contributors as follows; the Reading Partners program has been awarded \$15,000 from the Campbell and Hall Charity Fund and \$13,030 through in-kind book donations from the Ella Fitzgerald Charitable Foundation since 2010, \$20,000 from Tufts Health Plan Foundation over the past 2 years, \$5,000 in a one-time gift from Verizon in 2011, and \$2,000 from first time funder Target Corporation this year; the Money Management program has been granted a total of \$152,100 since 2010 from several banks, charitable foundations, trusts, and the Massachusetts Bankers Association; since 2010, the Congregate Meal Site program received \$10,000 from the Arthur S. Reinherz Charitable Foundation, \$21,000 from the Malden Redevelopment Authority, and \$8,000 from Comcast; Food Pantries have been awarded \$22,5000 from the Arthur S. Reinherz Charitable Foundation, \$5,000 from Shaw's Charitable Foundation, \$3,500 from The Savings Bank Foundation, \$14,500 from BJ's Charitable Foundation, \$3,224 from Whole Foods Foundation, \$1,000 from the Walmart Foundation, and \$3,694 from area health organizations.

## Strengthening Communities

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### Strengthening Communities

Mystic Valley Elder Services (MVES) a private, nonprofit organization founded in 1975 has sponsored RSVP of Middlesex County since 1996. RSVP of Middlesex County serves eight cities (Cambridge, Everett, Malden, Medford, Melrose, Somerville, Waltham and Woburn) and 10 suburban towns (Arlington, Belmont, Burlington, Lexington, North Reading, Reading, Stoneham, Wakefield, Watertown and Winchester) north and west of Boston in the eastern part of one of the oldest counties (founded in 1643) in Massachusetts. The population in the 142 square mile area is 1,537,215. Residents age 65+ make up 13.5% of the county and 14.5% of this project's service area, most notably 18.6% of Stoneham, 15.8% of Melrose, and 16.2% of Winchester. Of all county residents age 60+, 28.6% live alone and 8.9% are living with a disability (U.S. Census Bureau, 2011). Over seven percent of those 65+ report a self-care difficulty and 14.6% report an independent living difficulty (www.pascenter.org, 2010). The majority of residents is white. The largest Black/African American populations are in Malden (14.8%), Everett (14.3%) and Cambridge (11.7%). Malden, a gateway immigrant community, is located on rapid transit leading directly to Boston's Chinatown and has the largest Asian population (20.1%). Everett (21.1%), Waltham (13.7%) and Malden (8.4%) have the largest percentage of Latinos (www.factfinder.census.gov). On average, a language other than English is spoken at 25.4% of the homes in this service area, as compared with 21.4% of the state. The percentage of people living below the poverty level for Massachusetts is 10.7; within the region communities range from Reading (1.9%) to Malden (14.1%), Somerville (14.9%), and Cambridge (15.1%) (www.quickfacts.census.gov, 2011). According to the new Supplemental Poverty Measure, released in 2011 to enhance the original Official Poverty Threshold data, 15 to 19% of Massachusetts people age 65+ show incomes below 100% of the Supplemental Poverty Threshold (http://kff.org, 2013). Living costs in the Northeast are among the highest in the nation and Massachusetts seniors were determined to be the most economically insecure of all; on average their income brings in only 62% of what they need to live independently while paying for food, housing, energy, medications, and healthcare (UMass Gerontology Institute and Wider Opportunities for Women, 2012). This project is qualified to address the needs identified in the Healthy Futures Focus Area that exist so prevalently in these communities. By staffing local food pantries, providing financial literacy support, and distributing health care benefits information, RSVP volunteers are well-positioned to address the Primary Focus Area by contributing to the healthy futures of these aging, economically-disadvantaged local residents who are vulnerable to social isolation, functional impairment, and

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limited-English proficiency. Because of the volunteer interventions, the many participants of the 13 food pantry sites will report increased food security after receiving the monthly food donations, participating elders will report having increased social supports by way of effective help in time of need from their Money Manager volunteer, and thousands of Medicare enrollees will access vital information about health care, access, and benefits from their SHINE counselor.

### **Recruitment and Development**

#### Recruitment and Development

A strong RSVP volunteer corps is developed and strengthened through good volunteer management practices. The RSVP director promptly follows up with prospective applicants to interview them and check references. Screenings are also conducted through the criminal background information records (CORI), the national sex offender registry (NSOPR), and the Office of the Inspector General's (OIG) screening for fraud and abuse of Medicare, Medicaid, and other health and human services programs. Every effort is made to place volunteers in positions that meet their individual desire to make a difference. Once volunteers are placed and enrolled in RSVP, the RSVP director sends a welcome letter, a copy of the job description and the volunteer policies, procedures, and orientation handbook. Training and technical assistance for volunteers and project and station staff is essential for volunteer retention and overall success of the project. The director offers technical assistance and guidance to station supervisors which could include instruction about completing the monthly timesheets or providing guidance with job design or cultural competency challenges at food pantry sites. Schools receive training from the Reading Partners program coordinator who makes regular visits to provide instruction for both the staff and volunteers. Individual programs are responsible for both initial and ongoing training for their volunteer staff, ranging from on-the-job training at food pantries to 60 hours of classroom instruction for SHINE (Serving the Health Information Needs of Everyone) counselors, followed by required monthly in-service workshops and statewide daylong seminars. Experienced SHINE volunteers are an integral part of the team and serve as mentors for newly trained volunteers and some veteran Money Management volunteers take on the additional role of auditing the program reports to ensure that all financial records are balanced. The project fully trains Reading Partners about topics and techniques in literacy tutoring for struggling students, SHINE Counselors about health benefits options for Medicare recipients, Money Managers about delivering financial literacy to the homebound and disabled, and Food Pantry and Meal Site volunteers about helping food insecure and socially isolated individuals to obtain needed resources. RSVP of Middlesex

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County has begun exploring the possible use of social media for volunteer training purposes, specifically Facebook and YouTube and will continue throughout 2013 to assess the viability of using such training tools. Creating a ListServ for the growing number of volunteers with email addresses is also being considered as way to foster connections and sense of community to deepen the volunteer experience and increase retention. The RSVP director provides ongoing recognition through birthday, holiday, National Volunteer Week and thank you cards, as well coordinating an annual recognition banquet. Volunteer Satisfaction Surveys are conducted annually to highlight relevant data about the quality of the volunteer placements for all RSVP enrollees. The following 2013 results point to high quality assignments for participants, 37% of whom have volunteered for this project for 4 to 17 years; 93.23% of respondents agreed that they are more active because of their volunteer work, 99.99% said they enjoyed their volunteer work and look forward to it, 88.89% reported developing new skills through their work, 96.7% said they have formed new relationships with other volunteers, the people they serve, and or the station staff, 92.22% felt more connected to others and the community because of their volunteer work, 98.85% experienced a sense of accomplishment because of their work, 96.55% felt recognized and valued for their volunteer contributions, and 97.72% said their volunteer work has made a meaningful difference in their lives. Additionally, 96.55% of those surveyed said their training was sufficient to provide a clear understanding of their job, 98.88% said station staff was welcoming and available for guidance, and 100% said they planned on volunteering as long as they are able to. One volunteer commented, "Your programs cover a wide array of helping those in need but in the end, it is the Volunteer who is helped the most, to understand, to give, to welcome, and to learn. Thank you for the opportunity to contribute to our community". All survey results, along with feedback from program consumers and staff, serve to inform the ongoing management of each program. The RSVP director continues to strive to recruit a more diverse corps of volunteers through local faith-based, civic, and other organizations that engage Asian, Haitian Creole, Hispanic, Russian, African Americans, disabled citizens, veterans, and members of the LGBT community in this service area. One of the key agenda items for the RSVP Advisory Council has been and will continue to be the ongoing endeavor to broaden our volunteer base to better represent the community demographics. Since 2012, all volunteer languages are entered in the volunteer management database, Volunteer Reporter, to effectively match volunteers with the growing numbers of non-English speaking clients who need them. The project can also use this information to note how bi-lingual volunteers heard about the program, highlighting the best recruitment sources for volunteers of diverse cultures. The matching of non- or limited-English speaking elders with Money Manager volunteers who speak

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Haitian Creole or Mandarin, for example, encourages diversity among the clients as well. Additionally, program surveys are being translated into an ever increasing number of languages that reflect our emerging community, like Russian, Haitian Creole, and Chinese, allowing all clients to engage in and impact the RSVP volunteer programs by their survey responses. In 2013, this sponsor hired a Diversity Training consultant to help us develop a plan that addresses issues of racism and discrimination to maximize the best possible results of bringing together volunteers, staff, and clients of diverse backgrounds. As diversity builds among the volunteer pool, program management steps, from recruitment to training and recognition, will be further enhanced to meet the needs of the broader audience.

### **Program Management**

#### Program Management

An example of how the RSVP director develops and manages volunteer stations and assignments to address community needs and provide meaningful placements for volunteers is the successful Reading Partners program. The program currently serves school systems where the state mandated student proficiency tests have shown that a significant number of third grade students taking the English literacy test rank as either needing improvement or in danger of failing. Based on this data, the RSVP director and Reading Partners program coordinator contacted schools in the targeted communities that were not already served by RSVP to explain the educational benefits of pairing RSVP volunteers with their students. This endeavor resulted in the successful expansion of the Reading Partners program from nine schools in 2006 to 20 in 2013 and increased the number of volunteers engaged in this meaningful service from 35 to more than 70. Recently, the town of Stoneham was identified as a community in need of increased school literacy support. The Reading Partners program coordinator met with school administrators, who welcomed the proposal of an RSVP intervention, and garnered support from the Stoneham Senior Center to help with volunteer recruitment, meeting space, and transportation. To date 14 volunteers have been screened and an MOU will be developed and signed to bring the Colonial Park Elementary School on board for the fall of 2013. In addition to the RSVP director's responsibility for establishing the program's visibility and support in the community, recruiting, screening, and developing RSVP volunteers, evaluating program performance, and conducting all program management activities from developing meaningful assignments to ensuring the accountability of program resources, financial and in-kind, the director guarantees that the project has the necessary, daily administrative support. The director ensures that the monthly volunteer

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hours are entered into the database and mileage reimbursements are processed, maintains accurate files to meet RSVP requirements (such as regularly updating volunteer contact information), and writes and submits all CNCS grant applications and reports. Volunteer position descriptions are carefully written with input from the related program managers and station staff so that volunteers will be clear about their assigned service activities and responsibilities. Staff and volunteers are given their own copies for ongoing reminders. Should volunteer performance problems arise, they are brought to the attention of the RSVP director who collaborates with the program staff and volunteer to resolve the difficulty in compliance with RSVP regulations. Age eligibility for RSVP is confirmed when applicants are interviewed and complete a criminal background check form that requires their date of birth and a photocopy of their photo ID acts as a backup. The Memorandum of Understanding (MOU) for volunteer stations is signed yearly for new stations and every three years for established sites. The date is entered into the Volunteer Reporter database for tracking and reporting purposes. A hard copy of the MOU is maintained in a station file along with all related documentation, such as the RSVP Station Handicap Accessibility Certificate. Volunteer stations are regulated by the guidelines of these MOUs. For example, any prohibited activities such as asking volunteers to engage in political or religious activities are clearly spelled out in the document and discussed at the time of signing. If changing community needs or poor performance result in the graduation of a station, volunteers are given as much prior notice as possible and ample opportunity to find an alternate placement with this project. Ongoing communication with station supervisors and site visits remain critical to managing the success of these stations. The Reading Partners program coordinator travels several times a month to the school sites and utilizes daily telephone and email communications to stay connected with the volunteers and all pertinent school staff including administrators, teachers, specialists, and site liaisons. He addresses issues including volunteer placement and scheduling, compliance of RSVP requirements such as timesheets, appropriate student referrals, or volunteer supervision. He also meets monthly with volunteers at each school. In order to ensure compliance and meet performance measures, the RSVP director conducts several annual surveys of program recipients, volunteer stations, volunteers and community partners. MVES shares the same mission as the CNCS Primary Focus Area under Healthy Futures; to increase seniors' ability to remain in their own homes with the same or improved quality of life for as long as possible. Since 1975 MVES, which is one of the largest elder service access agencies in Massachusetts has a proven track record of providing a full range of information, services and support that has included food pantries since 2005 and SHINE and Money Management programs since the 1990s and have been measuring the benefits of each for as many

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years. The RSVP director will consult with the RSVP Advisory Council to seek the group's help in identifying more diversified partner organizations in order to broaden the ways that RSVP volunteers can make a difference within the region. The RSVP director will utilize input from the RSVP Advisory Council whose members represent local professionals who serve diverse and low-income populations, when designing, implementing, and evaluating, these RSVP supported initiatives.

### **Organizational Capability**

#### Organizational Capacity

MVES has provided service to older adults for 38 years and sponsored RSVP of Middlesex County since 1996. The agency is committed to providing quality programs for elders who receive home care as well as service opportunities for healthy, active older adults. A core value stresses the importance of working in a team environment which means that the RSVP director is able to access all agency resources. MVES Executive Director Daniel O'Leary has more than 35 years' experience as a senior level manager in the aging network in Massachusetts and has been agency director for 26 years. The RSVP program is administered through the MVES Community Programs department and Department Director, Vida Poole. Lauren Reid, RSVP Director since 2006, has a BA in social work. She previously worked as a case manager and has a background in elementary education and volunteer administration. She supervises Ken Neal, Reading Partners Program Coordinator who joined MVES in 2008. He is a retired school principal with a BA in education and a Masters in school administration. He has more than 40 years' experience in teaching, curriculum development, grant writing and creating partnerships among schools, corporations and universities. Larry Poirier, supervisor for 34+ Money Management volunteers, has an MBA in nonprofit management and more than 20 years' experience working in nonprofits. SHINE Director Irene O'Donnell, has a BA in liberal arts and business administration and 40 years' experience in public relations, development and human resources. Outside of the Community Programs department, Nutrition Director Angie Fitzgerald responsible for food pantry, meal site, and home delivered meal quality and delivery, has 20+ years' experience in the food service industry. Director of Quality Improvement, Joe Quirk, oversees continuous improvement and conducts annual customer satisfaction surveys for MVES and is available as needed to provide guidance with the design and development of volunteer and client satisfaction surveys for the RSVP programs. Development Associate Joan Wolfson has an advanced certificate in Fundraising Management and a background in grant writing and helps the project procure the required non-federal resources. The agency's Human Resources department provides

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assistance to the program by helping the RSVP director with reference and background checks. Additional staff in the Community Programs, Accounting, and Office Administration departments provides support for all sponsor departments including the RSVP program. All positions have job descriptions and grade levels, and employees receive an extensive orientation and personnel policies handbook. The MVES mileage reimbursement policy is utilized by the RSVP director for work related travel. The RSVP director has a private office, access to all necessary equipment and supplies and is provided with sufficient funding to attend Volunteering and Service Conferences and workshops. Following is a brief description of the sponsor's purchasing procedure which the RSVP project is expected to follow. As a nonprofit, MVES expects that purchases will be made only after carefully researching the product to ensure it is of high quality and the price competitive. MVES provides basic office supplies (lined paper, steno pads, pens, pencils, paperclips, tape, scissors, and printer cartridges) to all programs and departments on a shared basis. There is no separate charge to RSVP for the use of these products. Should the RSVP director wish to order any supplies that are not kept on hand, she would fill out a request on an order sheet maintained on a clipboard in the supply room. The request must be approved by the immediate supervisor, and the item is then charged directly to the RSVP program. If the RSVP director needs to purchase any items that are not available through the office supply vendor, she completes and signs a check request form that includes the name and address of the vendor, the item to be purchased, and the amount. The immediate supervisor must sign off on the form before the item can be purchased, and the form is then forwarded to the MVES fiscal department. The RSVP director will order the item; MVES does not have a purchasing department. For approved purchases ordered either online or over the phone, the RSVP director may be given permission to borrow the sponsor's corporate credit card. The MVES Fiscal department enters all purchases, including those for RSVP, into the appropriate cost center in the accounting software. The RSVP director works closely with the sponsor's Chief Financial Officer meeting regularly to review the grant budget; specifically the monthly funds disbursed and funds remaining, which dictates spending for the remainder of the fiscal year. The agency's management staff meets monthly with the board of directors to present current financial information and future projections. The board approves all financial reports. During the year, MVES' CPA reviews and presents to the board, the sponsor's financial statements and tax returns. MVES has the capacity to assure that the project has adequate facilities, equipment, and supplies. MVES charges the RSVP grant a percentage share of 1.20% for the depreciation of all shared equipment such as computers, software, the telephone system, and copy machines. Any purchases in excess of \$1,000 require multiple bids. MVES' prominent position in the

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community enhances RSVP's ability to receive in-kind donations of space and raffle prizes for its annual volunteer recognition, and all such donations are tracked according to RSVP program standards. MVES has extensive grants management experience. The agency holds a contract with the state for home care services, is the recipient of federal Older Americans Act Title III funds, and seeks grants through federal, foundation, nonprofit and community resources. Over the past ten years the MVES Development department has successfully raised a total of \$70,000 from the Campbell and Hall Foundation for the Reading Partners program. The Money Management program is partially funded through a state line item and supplemented with small grants from local foundations and banking institutions. The project also seeks opportunities to maximize its budget and reduce costs where possible. Savings have been realized by the increased use of email and online surveys. Additionally RSVP of Middlesex County is fortunate that its sponsoring agency, because of its nonprofit social service status in Massachusetts, is able to conduct the required criminal offender record information (CORI) background checks at no cost to the agency or project.

### **Other**

N/A

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

N/A