

# Narratives

## Executive Summary

### Executive Summary

Community Teamwork, Inc. is a \$70 million dollar community action agency serving over 37,000 low income residents from throughout the Greater Lowell area with a wide range of programs that include: all three Senior Corps Volunteer programs, Child and Family Services, Housing and Homeless Services and Energy and Community Resources. Our mission is to assist low income people to become self-sufficient, to alleviate the effects of poverty and to assist low income people to participate in the decisions that affect their lives. We are applying for funding to allow us to continue to provide high quality volunteer management with an anticipated 320 volunteers who provide critically important service across our community working with a wide range of institutions and with an even broader range of individuals. CTI's Senior Corps Volunteer programs have established themselves as a vital contributor across the entire spectrum of needs here in our community. Our RSVP volunteers teach Bone Builder classes to hundreds of participants providing them with health education as well as strength building, serve in local Senior Centers to keep their peers engaged and vital and act as friendly visitors to home bound seniors, help low-income families to take advantage of EITC tax returns, support ambitious math and literacy initiatives with students of all ages, work with local veterans providing resources, support and counseling,. RSVP volunteers contribute mightily to the quality of life in our region, in building capacity and our supporting agency and our community as a whole is committed to nurture and protect this valued program.

The primary focus area for this grant cycle is Healthy Futures. By the end of year one of the grant cycle, CTI anticipates that RSVP volunteers will provide companionship to over 500 people. They will assist over 250 community members with emergency food needs. RSVP volunteers will provide assistance to over 30 non --profit agencies in the community. At least 5 RSVP's will serve at the local Head Start program assisting 100 children with school readiness. RSVP volunteers will be placed in public schools focusing on math and literacy skills with at least 50 children. Ten volunteers will serve at CTI's EITC program assisting with over 500 tax returns, serving in the childcare room while parents are having their taxes done and providing resources and referrals to clients. Three RSVP volunteers will serve as Veteran's Peer Specialists to provide services to over 180 Veteran's and Military Families. RSVP volunteers serve the community in vast ways. CTI foresees that RSVP's will garner thousands of dollars in donations for local non-profits to optimize their service delivery.

The federal investment of \$52,631.00 will be supplemented by at least \$15800.00 of non-federal resources

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## Strengthening Communities

### Strengthening Communities

The community to be served is known as the Greater Lowell area. This area encompasses the city of Lowell, Massachusetts and the seven towns that surround it including Billerica, Chelmsford, Dracut, Dunstable, Tewksbury, Tyngsboro and Westford. Each one of these communities has a rich history and many distinct and unique offerings. Although most of the seven surrounding towns were predominately agricultural communities with vast amounts of land, many have shifted from agriculture to other industries. Commercial businesses including high-tech firms, industrial parks, and large shopping centers are offered in each of the towns. There are also multiple recreational opportunities due to the large number of lakes, ponds, and hills throughout the area. The communities that make up the Greater Lowell area are situated close to major highways including Route 495 and Route 3 and all are within a 45 minute commute to Boston.

The City of Lowell is the fourth largest city in the Commonwealth with a total population of 106,519. With its rich history dating back to the Industrial Revolution, Lowell became known as the Mill City where it welcomed waves of immigrants from Ireland, Greece and Canada to work in the mills and to build its elaborate canal system used for harnessing water for power. However, once the textile industry began to collapse, businesses and shops started to close resulting in a loss of jobs and an increased number of vacant store fronts. It has taken time and planning for Lowell to transform itself from the deteriorating Mill City it became in mid-1900's into a Destination City for tourists who come in droves to visit the first Urban National Historical Park in the country, to partake in the largest annual free Folk Festival in the country and to visit the many museums and a multitude of cultural and artistic events that Lowell now offers. In addition to the many cultural attractions, Lowell is home to two prestigious academic institutions, the University of Massachusetts at Lowell and Middlesex Community College, both of which have campuses in the heart of the downtown area.

Lowell has continued as an entry point to newcomers, with the arrival of immigrants and refugees from countries including Cambodia, Laos, Vietnam, Colombia, Brazil, the Caribbean, Burma, Bhutan, Portugal, Iraq and over 20 countries in Africa. The U.S. Census 2010 American Fact Finder indicates Lowell's race/ethnicity at 60.3% White, 6.8% Black, 20.2% Asian and 17.3% Hispanic. For the past 20 years, Lowell has been designated by the US Department of Housing & Urban Development (HUD) as a Renewal Community and Empowerment Zone based on its rate of poverty and unemployment.

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The characteristics of Greater Lowell vary. The total population in Lowell and the contiguous communities ranges from 106, 519 in Lowell to the smallest of the seven towns, Dunstable with 3,179. The median household income contrasts with the highest coming from Dunstable at \$190,205 to the lowest in Lowell at \$50,313. The number of families living below the poverty level in the city of Lowell is 14.3%. Unemployment rates range from 8.6% in Lowell to 5.3% in Chelmsford.

As the second largest Community Action agency in Massachusetts, Community Teamwork, Inc. (CTI) provides early education and care for children, rental assistance, first time home-buying classes, financial education and volunteer income tax assistance, fuel assistance and energy conservation programs, and WIC (nutrition for pregnant and postpartum women, infants and children under five). For more than 45 years, CTI has also sponsored the Foster Grandparent Program, Senior Companion Program and Retired and Senior Volunteer Program, all of which make up our Senior Corps Programming. Through this multitude of services, CTI served 47,500 individuals last year alone and has developed numerous partnerships across the region to address the many complex needs of our community.

As a culturally diverse community, we face challenges associated with the changing demographic and linguistic make-up of the area. Employment is very hard to find for non-English speaking individuals and school performance in both Lowell and its working class suburbs lags due in part to an ongoing influx of children whose first language is not English. The Massachusetts Dept. of Elementary and Secondary Education School and District Profiles indicate that 75% of Lowell's students are from low-income families and English is not the first language of 41.7% of students. Lowell also struggles with youth gang violence, a high poverty rate, a low high-school graduation rate, a limited number of family-sustaining entry level jobs, and costly housing.

To meet these needs, Community Teamwork solicits input into program planning in many ways. CTI's Senior Corps Programs partner, the UMass Lowell Center for Family, Work and Community and area volunteer groups, as well as with the Chamber of Commerce and local Rotary Clubs. Our Advisory Council includes representatives of the business community as well as senior volunteers, station representatives and agency staff. In addition, we obtain input through our many links to the community.

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We also partner with the Greater Lowell Health Alliance which is comprised of healthcare providers, business leaders, educators, civic and community leaders with a common goal to help the Greater Lowell community identify and address its health and wellness priorities. They work together on community-based health promotion and building a healthier Greater Lowell community. Our participation with the Greater Lowell Health Alliance has helped to identify community needs so that we may find ways to address them.

Community Teamwork, Inc. (CTI) has identified Healthy Futures including Companionship, Bone Builders, and Obesity and Food as its primary focus area due to the needs that exist across Massachusetts and, in particular, within our geographic service area.

Nearly 10% of the Greater Lowell population is over 65 years of age. Thought slightly younger than the State as a whole due to the significantly younger immigrant population, the elders in our community are much more likely to be poor, suffer the health and social consequences of poverty. More than 14% of Lowell residents over the age of 65 live below the poverty level. Further, 1 in 5 of the oldest elders (those over 75) who in our community are disproportionately women, live in poverty.

Additionally, Lowell is federally designated as a Medically Underserved Area and Health Professional Shortage Area. According to the Massachusetts Department of Public Health, in Lowell, rates of overweight and obesity that put people at increased risk for heart disease, stroke and Type 2 diabetes, are higher than average. Heart disease also continues to be the leading cause of death among Massachusetts' residents. In Lowell, heart disease, stroke and diabetes mellitus were higher than state age adjusted rates. Lowell has the second highest heart disease age adjusted death rate out of all cities and towns in Massachusetts. (Populations over 40,000)

UMass Boston's Center for Social and Demographic Research on Aging has indicated that individuals who are 65 years and older are the fastest growing age group in Massachusetts and are expected to grow by 61% over the next 20 years. This is primarily due to the aging Baby Boomers, those individuals born between 1945 and 1964. Research has shown that social interaction is crucial for older adults in maintaining strong emotional health as well as improved physical health. Social interaction and companionship among the elderly may include volunteering at a local school or community center, participating in activities with other seniors, joining a bridge club or a book club,

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taking a class, joining a gym or other fitness center or simply staying in touch with friends, family, grandchildren or other relationships. Specific health benefits of social interaction and companionship include a reduced risk for Alzheimer's disease, lower blood pressure, and reduced risk for depression and loneliness. Social interaction and companionship are also known to keep your brain active. This, coupled with a healthy lifestyle that includes good nutrition and physical activity can lead to improved quality of life and overall healthy aging.

An added benefit of social interaction and companionship, especially when combined with physical activity, is better bone health. Osteoporosis is a bone disease characterized by decreased bone mass and poor bone quality. It leads to an increased frequency of fractures of the hip, spine, and wrist. According to the Massachusetts General Hospital, a world renowned medical facility located in Boston, osteoporosis affects over 10 million Americans over the age of 50, with women four times more likely to develop osteoporosis than men.

Massachusetts General also reports that another 34 million Americans over the age of 50 have low bone mass (osteopenia) and therefore have an increased risk for osteoporosis. CTI's RSVP Volunteers have helped to address this rising health risk by launching a very successful Bone Builder's Program in partnership with Tufts Medical Center to help seniors to prevent further bone loss and reduce their risk of developing osteoporosis while staying socially active. The Bone Builders program not only provides strength and balance exercises but also offers education regarding the risks of falling and provides a social component for many elders who would otherwise be sitting at home with nothing to do. The Bone Builders classes lead to positive outcomes such as a reduced risk of falling, weight management, mental acuity and overall healthy lifestyle. Additionally, CTI RSVP Volunteers serve as Friendly Visitors and provide companionship to homebound elders. Services provided will include help with meal planning and preparation, non-strenuous physical activity, and outreach on services such as fuel and food stamp assistance, finding and providing transportation, to and from medical appointments, and grocery and errand shopping. This beneficial program assists elders in remaining in their home, enhances social connections and relationships and better quality of life. The demand for services such as Bone Builders and Friendly Visitors that helps to enhance the health and well-being of a growing aging population, ensure longer and healthier independent living currently exceeds our capacity to meet the need. Additional volunteers will allow us to serve all on our current wait list.

The population in Middlesex County of Massachusetts is approximately 1.5 million and 7 percent of

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which live below the poverty line ([www.uscensus.gov](http://www.uscensus.gov)). The number of families living in poverty directly correlates with the need for emergency food services. The Merrimack Valley Food bank provides food to local non-profits to assist them in feeding families and individuals in crisis, by offering soup kitchens in the community and in stocking shelves of food pantries for others to access food and personal care items. The need for volunteers to help these programs meet their mission is substantial.

CTI's Other focus areas will include School Readiness, Education K-12, Economic Opportunity- VITA, Veteran's and Military Families, Capacity Building and Non-Profit Support. Community Teamwork provides early education and care for over 1,200 children each year through our center-based and home-based Early Learning Programs. We understand the importance of preparing children for school readiness. RSVP's will be placed within CTI's Head Start classrooms working with pre-school children to help them become school ready. Research confirms that school readiness encompasses a whole range of physical, social, emotional, language and cognitive skills and findings show that children from low-income families are more likely to start school with educational challenges due to social, emotional and health problems.

The National Center for Education Statistics indicates that children who are not performing proficiently in reading by the end of the third grade are at high risk for poor long-term outcomes such as dropping out of school, teen pregnancy, and involvement with the juvenile justice system. To alleviate this in our service area, RSVP placements will be available in Greater Lowell public schools tutoring children in grades k-12 in areas of math and literacy.

Volunteer Income Tax Assistance (VITA) Program provides free tax preparation services to low-income individuals and helps people obtain the Earned Income Tax Credit. RSVP's will be trained to provide tax preparation to over 500 participants who use this service. Other RSVP Volunteers will assist with intake, making appropriate referrals, or assisting with child care while parents are having their taxes completed. The services provided through the VITA program are free therefore providing savings to families. Additionally, low-income families are able maximize their income through tax credits making a tremendous difference in a family's ability to meet their financial obligations.

Data from the 2011 American Community Survey by the U.S. Census Bureau demonstrates approximately 73,000 veterans are living in Middlesex County with over 5500 of those veterans

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residing in Lowell, Massachusetts. Data shows that over 20% of these veterans live below the poverty line. Additionally, data proves that there are an estimated 1750 homeless veterans in Massachusetts with 70% suffering from alcohol or drug abuse and 45% with mental illness. There are 62 transitional housing units in the northeastern U.S. for veterans, one of them is located 3 blocks from our headquarters- Lowell Transitional Living Center. Counseling services, housing, workforce training, food and childcare are just some of the needs that challenge those veterans living in poverty.

Social service agencies and cultural institutions rely on volunteers to assist with fundraising and optimize service delivery. Budget reductions exacerbate this need, and the services provided by volunteers are essential.

The activities and services that our RSVP Volunteers provide directly impact the needs of the Greater Lowell community and demonstrate measurable performance outputs/outcomes. CTI has targeted Healthy Futures as its Primary Focus Area due to the rapid growth of an aging population and the health risks that this age group may face. With Healthy Futures as our primary focus area, CTI's RSVP volunteers will provide service hours at the local food bank assisting with food distribution. In addition, the volunteers also collect food items at our Annual Senior Corps Breakfast of Champions where attendees are asked to bring a healthy non-perishable breakfast item which is donated to the food bank. Over the past ten years, RSVP's collected and donated over 3,000 lbs. of food for needy families.

RSVP volunteers will also focus their time providing companionship at Adult Day Centers as well as Council on Aging programs. A major source of companionship has been CTI's RSVP Bone Builders program. The Bone Builders program offers the socialization and companionship that so many of our seniors need, along with the inherent benefits of group exercise. RSVP Bone Builders is exercise and osteoporosis prevention program that meets twice per week on an ongoing basis. Classes are held at seven (7) senior centers within our service area reaching people 60 years of age and older who are seeking social interaction and who may also be at risk of falling and of age related bone loss. An important benefit to the RSVP Bone Builders program is the socialization support that encourages continued participation and camaraderie, especially important to seniors living alone. The Bone Builders Program provides companionship to hundreds of senior citizens each year. By the end of 2014, CTI expects that sixty (60) RSVP Bone Builder Leaders will offer socialization opportunities as well as health education to 270 seniors through these exercise classes. Based on the results our 2012 year-end survey of 179 Bone Builder participants, 99% indicated significant or moderate improvement

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in socialization and social well-being. Clearly, the results of the survey and the activities provided within our Primary Focus area lead to the National Performance Measure Outcome H9, or number of homebound or older adults and individuals with disabilities who reported having increased social ties/perceived social support.

In addition to our Primary Focus area, we will also target Education, Economic Opportunity, Capacity Building, Veterans & Military Families and Non-Profit Support. The selected areas and National Performance Measures are as follows: Healthy Futures- Aging in Place will use H8 as an output, companionship as the service activity and H9 as the outcome. A second Healthy Futures- Aging in Place work plan will use H13 as an output and companionship as the service activity but will be an output measured work plan. Obesity and Food will use H10 as an output and is also an output measured work plan. School readiness will be an outcome measured work plan. The output measure for school readiness will be ED 21 and outcome measurement will be ED 23. For the Education K-12 work plan, the output measurement is ED 2 and outcome measurement is ED 5. Additional output measured work plans include Economic Opportunity VITA with 01 output, Capacity Building with G 3- 3.16 and Veterans and Military Families using V8. Community Priorities Non-profit Support will be measured by the number of unduplicated volunteers and total number of volunteers.

CTI has an infrastructure in place to properly manage volunteers and collect and measure performance outcomes. All data, including volunteer hours and demographic information is entered into a database called Volunteer Reporter. Individual volunteer files that include annual financial eligibility, contact information updates and physician's forms as well as performance assessments are maintained in locked file cabinets within the program office. Volunteer time sheets are kept in CTI's fiscal department.

Performance of volunteers and appropriateness of placements are also assessed continuously by ongoing contact with station supervisors. On a monthly basis, volunteers sign and submit their volunteer hours to station supervisors who validate hours along with the Community Resources Director. Volunteer hours and highlighted accomplishments are reported monthly to the agency's Board of Directors and the Executive Director.

In addition, an annual survey, modified from one developed by Peter Gartland in 1999, asks supervisors to evaluate their volunteers for the characteristics and capabilities that allow them to carry

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out their assignments. This survey helps Senior Corps staff assess the placement of the volunteer, determine what additional training may be needed, and stay on top of any changes that may occur over time as volunteers age. It also offers a window into the supervisors' understanding of the volunteer program and its parameters and can serve as a review of the stations' needs.

Impact work plans include goals and objectives set by RSVP staff and Advisory Council members with input from station supervisors and follow the National Performance Measures. Outcomes are assessed by annual surveys of station supervisors who report on achievements and/or by volunteer or station logs that track input and intermediate outcomes. We use survey forms developed by Project Star our evaluation consultants -- forms are modified as needed when work plans change. Information and data obtained by performance measures are maintained in station files, and RSVP staff work with station supervisors to ensure that challenges or difficulties are addressed to optimize impact.

In measuring Healthy Future outcomes, CTI uses attendance sheets to show the number of participants attending classes on a daily basis. These are collected on a monthly basis and entered into a database. Participants are also surveyed to measure key outcomes including the percent of participants who show significant or moderate improvement in socialization, social well-being, balance, flexibility and strength. Pre and Post Surveys are used to measure increased food security in clients using food pantries and soup kitchens.

Educational outcomes are collected twice; once at the beginning of a school year or when a new assignment begins, and then again in June. In measuring Educational outcomes, Assignment Plans are used to measure the number of children with gains in school readiness and/or the number of students with improved academic performance in literacy and/or math. Based on the Assignment Plans and additional data obtained from assessment questionnaires, we estimate that 90% of the children who are enrolled in our Head Start Program will demonstrate gains in school readiness in terms of social and/or emotional development.

CTI's Data on Volunteers is collected on attendance logs while data on the numbers of participants is tracked on sign-in sheets. Additional data is obtained through the submission of the tax return to the IRS. We are informed of not just the numbers of individuals who benefitted from free tax preparation, but also the aggregated dollar amounts of tax credits and refunds that were earned. Much of this money goes right back into the local economy ultimately strengthening our

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communities. During tax season, RSVP volunteers will address the CNCS National Performance Measure of Economic Opportunity.

CTI will demonstrate that 40% of our RSVP's will be placed in areas that lead to National Performance Measure outcomes. Additionally, 45% of our RSVP's will be placed at stations that support our primary focus of Healthy Futures. Three RSVP volunteers will work specifically with veterans and their families. Two RSVP volunteers, also known as Veteran Support Specialists, are already in place providing counseling, resources and referrals to veterans and their families. One is placed in CTI's Resource Center and another at Jaycee Place, a local public housing site for elderly and disabled individuals. Both of these dedicated individuals are veterans themselves and they play an important and integral role in the delivery of services and care to veterans and their families. They assist veterans in understanding their military benefits, in obtaining affordable housing and fuel assistance as well as a number of other benefits for which they may be eligible. We expect that 20% of those we serve in our Bone Builders classes, through companionship, in the Friendly Visitor program, at local Council on Aging and Adult Day programs Community Teamwork, Inc's RSVP Volunteers will be Veterans. These services are also tracked in Octopia, a web-based software application used agency-wide for client tracking. We plan to add an additional RSVP to help us serve at least 150 veterans over the three-year grant period.

As demonstrated in our work plans, CTI plans to enroll 147 RSVP's in the Healthy Futures Primary Focus Area. The work plans integrate and connect the four major elements including community needs, service activities, data collection plans and target numbers that lead to outcomes or outputs. Within the Primary Focus Area work plans, the community needs are clearly defined and the service activities demonstrate how the community needs will be met. CTI uses various instruments to collect the data and all instruments are noted on each work plan. Outputs and outcomes are also clearly identified.

As described above, we have collected information on the needs in our community in a variety of ways. We use that data to drive our proposed service activities so that critical needs in our community are met. We are confident that the resources dedicated to these activities are sufficient to meet the indicated outcomes (see work plans)

CTI will enroll 77 RSVP's in the Other Focus Areas and Capacity Building. A total of five RSVPs will

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be placed in work plans for Education School Readiness and twenty-four will be placed in Education K-12. Ten RSVP's will provide services to CTI's VITA program and three RSVP's will be placed in work plans for Veterans and Military Families. Thirty-five RSVP's will be placed in Capacity Building work plan. No more than 96 RSVP's will be placed in Community Priorities work plans.

As indicated above, activities are driven by data on the community and resources have been allocated to meet the outcomes.

CTI will place a total of 127 or 40% of unduplicated RSVP volunteers in work plans that measure outcomes. This number far exceeds the required 10% of unduplicated volunteers being placed in outcome measured work plans. Outcomes will be measured in Aging in Place, Education School Readiness and Education K-12 work plans.

### **Recruitment and Development**

Recruitment and Development of Volunteers:

CTI's RSVP program recruits and places seniors, including baby boomers, in rewarding and productive roles; their skills and experience contribute to improving both the community's well-being and that of the volunteers. We survey volunteers, host ongoing focus group discussions, and communicate regularly with our station contacts to ensure that placements are rewarding, engaging and impactful. We are committed to providing high quality experiences with opportunities to build skills, develop leadership, and enhance volunteers' quality of life.

New volunteers and those seeking new placements are interviewed to determine their interests, skills and life goals. Position descriptions are provided to all volunteers. New stations are asked how their volunteers will impact the organization's capacity to provide services and how they will be supervised and recognized. Memorandums of Understanding (MOUs) are maintained with all partners. RSVP volunteers are drawn from several demographic groups--long-time retirees who have served as volunteers for years, more recent retirees who bring their professional skills but who are also interested in learning new skills, and those who are actively employed who have less time to give but are seeking ways to contribute to their community.

For over 40 years, our RSVP Volunteers have consistently reported tremendous satisfaction with the opportunities provided to them. In 2012, surveys demonstrate that 70% of our volunteers report improved health, enhanced social connections and better quality of life by participating in the RSVP program.

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Both new and experienced volunteers are supported in getting the most out of their placements through on-going training, workshops and information sharing. Stations are encouraged to provide training specific to their needs such as first aid, CPR, cultural competency or literacy techniques. RSVP volunteers are also afforded training opportunities in new areas- such as ESL teachers for adult immigrants, or Bone Builders fitness classes that are led entirely by RSVP volunteers and who also oversee the evaluation process for the project. Other volunteers serve as trainers for staff or Board members at local non --profits, senior centers, or child care facilities. We have veterans serving as RSVP volunteers in CTI's Resource Center and at a local public housing site. They provide resources, referrals and counseling to veterans and their families. These placements have been very successful in that the volunteers have first-hand knowledge and understanding of their clients' needs since they too are veterans. They participate in workshops and other trainings to learn more about community offerings so that they can be an advocate for local veterans. These placements have provided meaningful opportunities for our veteran RSVPs. We ensure that our RSVP volunteers receive all the training they need to be successful in addressing the community needs as outlined in the work plans.

We use many methods to recruit our volunteers, all of whom are reflective of the community we serve. We've prepared English and Spanish RSVP presentations to demonstrate the value and benefits for RSVP sites such as Senior Housing facilities and Council on Aging programs. Press releases are written that highlight the program and the services RSVP volunteer provide. Notices about the program and current volunteer opportunities are placed in church bulletins and newsletters aimed at 55 and older audiences. We also use the Corporation for National and Community Service marketing materials and disseminate them throughout the Greater Lowell community and we participate in community events such as health/non-profit fairs or business expos to distribute printed materials and answer questions.

We effectively use media through Community Teamwork Inc.'s Community Matters local cable television show and use web-based recruitment to reach on-line audiences of potentials volunteers. Most importantly, we recognize and maximize the impact of personal testimonies as our most effective recruitment tool by encouraging current volunteers to promote participation among their friends and neighbors. Word of mouth has been a highly successful recruitment tool. Opportunities for networking among volunteers and station supervisors are also offered. We sponsor an annual volunteer recognition event that honor RSVP contributions and we offer donated tickets to theater and

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sporting events when available.

Our recruitment and training materials are available in both English and Spanish. We actively recruit members from our Latino community through radio announcements that are made on a local Spanish radio station.

Our Advisory Council is a huge resource for obtaining community input and in recruiting volunteers. Station supervisors and volunteers are represented on the Council as are local business people. We provide presentations to stations and community leaders and work with local partners who provide volunteers with training in computer skills, videography, marketing, etc. We also participate in regional and statewide councils that address RSVP- related concerns.

Staff continually solicits volunteer input concerning program ideas and potential placements and we provide ongoing support and advocacy to volunteers who encounter challenges in their placements. We offer opportunities for additional placements or changes of station when necessary to reflect volunteers' developing skills and interests. Manuals are provided both to volunteers and to station supervisors to ensure that program policies are clearly understood. Staff and current volunteers continue to look for opportunities to build and retain a corps of volunteers, and recognize their contributions. An annual event is held in November providing a luncheon, guest speakers, entertainment and an award ceremony where Volunteers are recognized for years of service. In addition, to the event, throughout the year Volunteers are provided with Birthday cards and certificates of achievement.

Community Teamwork also has many years of experience working and partnering with immigrant and refugee serving organizations. These include the Cambodian Mutual Assistance Center, the African Assistance Center and the Organization of Sierra Leoneans in Lowell, Inc., all of which CTI served as fiscal agent in order to help them get launched. These agencies will also assist us in recruitment by reaching out to the immigrant communities they represent.

### **Program Management**

Program Management:

For over 40 years, CTI has managed a thriving volunteer program in full compliance of program regulations. The program is led by the Director of Community Resources, Christina Santos-Gordon who has over 15 years of successful management experience. Memoranda of Understanding have been executed with each volunteer station. MOU's describe all responsibilities on the Sponsor Agency as well as the Station. All provisions are listed to ensure consistency and an understanding of what is expected by all parties involved. Both entities must sign as agreement that the MOU is clear. We

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ensure that volunteer stations are complying with the MOU by communicating with station leaders on an on-going basis. CTI's RSVP Advisory Council meets quarterly to assist staff in managing a successful program as mandated by CNCS. The Advisory Council, comprised of RSVP volunteers, station leaders, community members, business community members, representatives of local government and CTI Senior Corps Volunteer program staff, ensure the compliance with program regulations through oversight and regular communication with stations, volunteers and staff.

As described above, CTI has more than 40 years of experience ensuring that volunteers are making a valuable contribution to not only their station but also to the community at large. The RSVP Coordinator meets with each potential volunteer, assists them in filling out the intake application and CORI permission form. During the meeting, the potential candidate is interviewed so the Coordinator will ensure proper placement of their station. Once all eligibility criteria has been documented, the RSVP Coordinator will look for a placement at a current station or seek out a new station. MOU's are signed by station leaders prior to placing a volunteer. All MOU's are placed in a file in our office. Constant communication between the volunteer stations including annual assessments, work plans and/or evaluations ensures that both the stations and the volunteers are responding appropriately to the expectations of the program. The RSVP Coordinator plans scheduled site visits to review program requirements, provide consistency and communication of placed volunteers. Unscheduled visits are also provided throughout the grant.

To assess community needs, CTI Senior Corps staff and volunteers solicit input from numerous sources. The Advisory Council, CTI's Integrated Services staff, leaders from other non-profits, and participation in regional collaborations and coalitions all help to inform of changing community needs. CTI's Planning Department and Senior Corps staff make use of data and other materials provided by the Corporation for National and Community Service and its partners so we can monitor changes and/or trends. We also review and consider data from sources such as the US Census, the University of Massachusetts' Department of Regional Economic and Social Development, and state health and education systems. We review social and economic indicators from state and regional public health offices, elder services and social service agencies. Project planning and implementation for each of the work plans involves both the stations at which volunteers will be placed, and organizations or agents that provide direction and oversight for the stations. We work closely with members of Lowell City Council and the School Committee, as well as Student Services and Special Education staff in towns that are served by our school-based volunteers. We consult with local Boards of Health and hospitals to ensure that health-related activities meet local needs. In our 40 plus years

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of operating an RSVP Program, we have conducted comprehensive needs assessments and sought continual improvement at all of our stations to avoid any disruption to volunteers. We have kept pace with changing community needs. In the event that current stations no longer meet critical needs, we match volunteers with more appropriate placements.

Community Teamwork, Inc has managed the RSVP program for over 40 years. We have selected Healthy Futures as our Primary Focus Area for this grant cycle. Almost half of our volunteers will be placed in the Healthy Futures Focus Area. Over the years, CTI has placed hundreds of Volunteers in Adult Day programs and as friendly visitors at Council on Aging sites. Others have supported the work of the local food bank by distributing food to needy families and still others have led Bone Builders exercise classes to hundreds of participants. We have used surveys and attendance logs to measure our outcomes. Station leaders assist CTI's RSVP program with station surveys that request number of volunteers who provide assistance, attendance of volunteers, clients served. Bone Builder leaders provide assessments to measure health and social benefits of participants as well as attendance logs to measure attendance. We use the data to measure our outcomes and evaluate our programs' success in managing volunteers. Last year, our Annual Assessment of CTI's Bone Builders classes boasted a 90% improvement rate in balance, health and social connections.

CTI has successfully managed a RSVP program for over 40 years and followed all regulations outlined by the Corporation for National and Community Service. Volunteers are placed at stations that have a current MOU. As new organizations express interest in being a site, they complete an MOU prior to placing any volunteers at that station. Potential RSVP volunteers are interviewed and screened by following all proper CNCS regulations prior to placement at a station. This ensures proper placement as well as a positive experience for both the volunteer and the station.

The program's Advisory Council includes representatives of local government and the largest Council on Aging in the area, as well as direct supervisors and volunteers. Evaluation involves all of our site supervisors and the results are reviewed by the Advisory Council. CTI's Board of Directors also receives a monthly report of program activity; in fact, three members of CTI's Board are also active RSVP volunteers. The program is also included as part of our sponsor's Annual Strategic Planning and Outcome-Based Evaluation process as well as a tri-annual agency-wide evaluation by the National Institute for Quality Community Action

### **Organizational Capability**

CTI has nearly 50 years of experience managing federal contracts. We have a highly skilled fiscal department comprised of 10 staff and led by our Chief Financial Officer, Penny Judd who has more

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than 35 years of experience ensuring compliance with Federal and State regulations. CTI is audited by an independent auditor annually. Further, we are governed by a highly committed board who monitor performance and compliance on a monthly basis. CTI's RSVP staff works very closely with the agency's Fiscal Office to provide both programmatic and fiscal oversight and to ensure compliance with all RSVP Program requirements. The Director of Community Resources meets quarterly with the agency's Comptroller to review budgets and balance sheets, to track all programmatic resources, including in-kind and to oversee budgetary management and accurate financial reporting to our funding sources. Together, they ensure that resources are appropriately managed. In addition to fiscal oversight, the Director of Community Resources manages the day-to-day operations of program. She supervises the RSVP Coordinator and participates in the CNCS trainings to ensure compliance with all new and existing regulations.

RSVP resides in CTI's Division of Energy and Community Resources. This Division is overseen by CTI's Associate Executive Director, Connie Martin. Ms. Martin is a graduate of St. Michael's College in Vermont with a M.Ed. from the University of Massachusetts at Lowell. Connie has held numerous positions in non-profit management, in sectors including arts and culture, business management, workforce development and childcare programming. She is a 15 year member of the Lowell School Committee, and is on the board of directors of several non-profits.

As the Director of Community Resources, Christina Santos-Gordon assumes responsibility for the day to day management and oversight of the three Senior Corps Volunteer programs. Ms. Santos-Gordon reports directly to the Associate Executive Director for Energy and Community Resources. She is a long time employee of CTI and has a Master's Degree in Organizational Management from Ashford University and a Master's Certificate from Boston University's Institute of Non-Profit Management and Leadership Program. Christina currently sits on the boards of two community organizations- The Greater Lowell IDA Collaborative and the Greater Lowell Community Collaborative Advisory Board. RSVP Coordinator, Joan Aseltine is directly responsible for recruiting and placing RSVP volunteers and supporting current volunteers. She also manages relationships with many of our station supervisors. Joan has a BS in Community Leadership and Development from Springfield College and an extensive background in volunteer management as well as a graduate certificate in non-profit management from Bay Path College.

CTI has a 50 year history of strong stewardship and compliance with Federal and State rules and regulations. Over this period, we have developed strong internal controls that include by-laws, a mission, vision and values statement, personnel policies and procedures that include Equal

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Opportunity Employment, Compensation and Payroll and Information on Benefits. A Fiscal Manual was created that addresses specific policies and procedures. CTI also has established a Comprehensive Risk Assessment and Disaster Recovery Plan. In addition all programs have constructed policies and procedures as necessary. To maintain quality management, the agency is an active member of the Northeast Institute for Quality Community Action (NIQCA) whose mission is to promote excellence in the management of Community Action Agencies. Every three years, Community Teamwork participates in a comprehensive Self-Assessment and Peer Review evaluation process to identify strengths and correct weaknesses. This assessment process is comprised of six standard areas: Governance, Information Technology, Human Resources, Planning and Community Investment, Operational Management and Organizational Structure and Finance and Budget. After internally completing the intensive self-assessment process in each of the six standards, the agency underwent a mirror process with Peer Reviewers from other Community Action Agencies in other states. This investment in promoting management excellence sustains the maintenance of a strong and resilient network of Community Action services to promote the well-being and self sufficiency of low-income consumers.

CTI has demonstrated the capacity to develop and operate a wide range of difficult and complex programs. CTI has become the second largest CAA in the State of Massachusetts with a budget of \$ 70 million, in part by demonstrating its capacity to manage a broad range of federal, state, and local grants. CTI is currently managing more than 150 grants and contracts and has a reputation for fiscal responsibility, accuracy and timeliness in reporting. Accounting and Internal Controls: CTI emphasizes transparency and accountability in all of its fiscal practices. CTI is subject to an annual financial audit of the entire agency by an independent CPA firm, which reports directly to the Board's Finance/Audit Committee and the Board of Directors. CTI complies with Generally Accepted Accounting Principals (GAAP) and engages in an annual independent audit of our financial statements and our internal controls. CTI has a track record of adherence to all fiscal and programmatic reporting requirements of federal, state and private funding sources. The Finance Committee of the Board of Directors oversees the agency's finances and conducts monthly meetings with Executive Management to review and monitor the agency's finances. The Fiscal Office consists of a Chief Financial Officer who oversees a staff of nine finance professionals who are responsible for proper recording of all dollars coming into and going out of the agency and monitors over 100 program budgets and contracts and maintains payroll records, tax records, and fringe benefits for over 400 full and part-time employees. Accounting System: CTI complies with Generally Accepted

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Accounting Principals (GAAP) and the Chief Financial Officer supervises the Controller and Budget Director. The Controller oversees the fiscal office and all accounting staff. CTI's fiscal office uses the MIP Accounting software to address the financial management needs of the organization. CTI's fiscal staff are well trained in the use of this software which allows them the ability to create and manage budgets and track and report on multiple funds and budget and periods in order to meet reporting requirements.

### Other

n/a

### PNS Amendment (if applicable)

n/a