

# Narratives

## Executive Summary

RSVP of Dane County, Inc., established in 1972, became a 501 (c)(3) incorporated agency in 1977. Our mission is to make a positive impact in the community by recruiting volunteers age 55 and older to help deliver priority services to people of all ages, providing Dane County with a valuable resource. Our vision: RSVP aspires to build and expand a community wide network of volunteers and organizations that unites compassionate, experienced adults with meaningful and fulfilling services opportunities, which enrich the lives of the volunteers while enhancing support for people in need. We are requesting \$209,059 to support 1,640 volunteers.

An estimated 1,640 RSVP volunteers will serve in activities including: Transportation of Seniors age 65 and older and ambulatory disabled to appointments, delivering meals to frail elderly, and home visits to reduce isolation and enable seniors to remain independent; Transportation and volunteer opportunities for Veterans; K-12 Tutoring in Public Schools; and recycling/reusing materials. The Primary Focus area of this project is Healthy Futures. In addition to volunteers in national performance measure activities, RSVP volunteers will serve in other community priority assignments helping nonprofit and public agencies extend their services to people in need. The CNCS federal investment of \$209,059 will be supplemented by \$89,861 in non-federal resources.

At the end of the three-year grant, seniors and individuals with disabilities receiving transportation through our Driver Escort program will have increased social support. Of the 700 unduplicated passengers, we anticipate that 30% will respond to a survey and 80% of the respondents will indicate that they have received effective help during their time of need, an indicator of increased social support.

## Strengthening Communities

Dane County consists of an area of 1,201 square miles with the major metropolitan area being Madison, the state capital. There are seven other cities in Dane County including Middleton, recently named Money Magazine's Number One Best Places to Live. Dane County's 2012 population was estimated (2012 US Census Bureau Dane County Quick Facts) at 503,523, a 3.2% increase from the 2010 census. People over 65 comprise 11% of the total population and 31% live alone, a circumstance that creates a risk of isolation. The county, one of 72, is the third fastest growing county in Wisconsin, and fourth fastest for the population 65 and over. While Dane County is projected to grow 28% from 2010 to 2030, the population over 55 is expected to grow 65%, and the 65+ population is projected to

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grow at a rate of 124%. (Demographic Services Center, Wis. Dept. of Administration) . By 2030, the frail elderly population is projected to be more than 13,000, a 73% increase over 2010. Through RSVP, over 1,600 adults age 55 and older stay active and healthier through volunteer service while providing needed services for the growing senior population and other Dane County residents.

The service activities in our Primary Focus Area are: Transportation, Food Delivery, and Companionship. These three programs will lead to increased social support for 1,525 older adult/disabled individuals.

The RSVP Driver Escort Service provides transportation and escort to Dane County residents who are 65 years of age and older or ambulatory disabled. This service helps 700 older adults and individuals with disabilities who have no other transportation resources, such as bus, van, taxicabs, family and friends, to get to medical and other important appointments to help them live independently. Rural communities do not have bus service, and van service is only offered on a limited basis for group trips.

RSVP has a Memorandum of Understanding with 13 Senior Centers/Outreach Offices throughout Dane County to provide ride coordination either through paid staff or volunteer coordinators. Most of the volunteer ride coordinators work out of their home and agree to have their name and phone number listed in local Senior Center/Outreach Office Newsletters and other local community newspapers as the contact person for those needing rides. Since RSVP has a network of coordinators serving in local communities, our volunteers develop relationships with the passengers, acting as an important contact of social support. The coordinator helps keep the service running smoothly and cost effectively by matching passengers to drivers who live nearby. RSVP works with volunteer coordinators to provide them with the tools they need to do their job such as answering machines, and speakerphones. We also have some Senior Centers that have volunteers and staff who coordinate rides on site. In addition, paid staff at RSVP schedule rides for the Madison/Monona area.

The RSVP Driver Escort Service is "more than a ride." Volunteer drivers escort passengers, lending an arm to those who have trouble walking or negotiating stairs, assisting them to get in and out of a vehicle, finding their doctor in a clinic situation, etc. Since drivers serve in their local communities, they develop relationships with their passengers and serve as an important social contact for those living alone, a circumstance that creates a risk of isolation. There is no charge for the ride but donations are accepted. Volunteer drivers provide each passenger with an envelope which contains a description of the program and an evaluation form. Through comments on evaluation forms we

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know that passengers appreciate this service. "The service and drivers are great. They take you and wait for you. I commend your drivers. I do feel the Driver Services Program helps keep me independent and living in my home longer...The driver I had was very nice, prompt, and a good driver." "Without this service it would be very difficult to keep my medical appointments, especially on a fixed income. Again, it enables me to remain independent and get to my necessary MD appointments. The drivers are so polite, helpful and considerate, almost like a family."

In addition to providing transportation and escort, RSVP drivers work through their local Senior Center/Outreach Office to pick up and deliver meals to 800 older adults who are unable to cook and prepare their own meals. RSVP meal drivers deliver hot noon meals five days a week to Dane County residents (outside the city of Madison) 65 years or older and/or disabled, frail, unable to cook, and/or have short or long term health problems. RSVP volunteer drivers also provide important feedback concerning meal recipients, reporting back any concerns about their well being to volunteer station staff. In an RSVP survey of meal site supervisors in 2007, 76% agreed that RSVP Home Delivered Meal Drivers are providing services that are helping their clients remain independent, with 82% agreeing that RSVP drivers are an important source of feedback on meal recipients' status or condition to help their agency provide necessary/important services. These volunteer drivers, who serve in their local communities, develop relationships with the meal recipients, providing an important social contact (often the only visit/human interaction that day) for those who live alone. RSVP volunteer drivers derive great satisfaction from knowing their service is appreciated and that they are providing a needed service in their community.

RSVP of Dane County also recruits volunteers for assignments that provide companionship and emotional support to promote wellness and reduce social isolation for 25 older adults. RSVP volunteers make phone calls and friendly home visits to frail and homebound seniors, providing them with emotional support and helping them with minor household tasks to help them remain independent.

We will be measuring outcomes on older adult/disabled passengers receiving rides through RSVP Driver Services. Ride requests are recorded on the volunteer coordinator reports and submitted to RSVP each month. Volunteer drivers submit monthly reports that list passengers served, types of trips, date of service, etc. Driver Services staff review volunteer and coordinator reports and process

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driver mileage reimbursement claims. Volunteer staff enter passenger data in RSVP's database. RSVP's customized Access-based database was created in 2000 by a professional database designer, and managed by RSVP's Office Support Administrator. The database allows RSVP staff and volunteers to input and track such critical information as numbers of volunteers enrolled unduplicated and duplicated, active volunteers reporting hours for the period selected; hours reported by assignment and volunteer station ; locations of volunteer sites; volunteer racial, ethnic, geographical and age demographics; number of volunteers indicating disability; and other valuable data. The program was conceived largely in response to the reporting requirements of the Corporation for National and Community Service. It includes customized reports which have met past reporting requirements of the Corporation while providing flexibility in reporting details to other funders. Although this database has undergone revisions to comply with federal reporting requirements, new CNCS requirements will require significant changes. A committee of board, staff, agency representatives, and system representatives, is researching options to change the current database or purchase a new system by March 31, 2014 to meet new National Performance Measure data collection requirements.

Annual assessments are conducted by RSVP's Agency Assessment Committee which reviews all programs on a three year cycle. The committee conducts site visits and surveys volunteers. Results are presented to the board and staff with recommendations to improve and enhance services.

Service to veterans and/or military families:

Through RSVP's Vets Helping Vets program, veterans are recruited as volunteer drivers and use their own vehicles to drive and escort veterans and veterans' family members to help them remain independent. Veterans who are unable to drive receive a ride from a fellow veteran volunteer driver who understands some of the problems that veterans are facing. Services are targeted to veterans and veterans' family members without transportation but able to physically access an automobile with minimal assistance. Referrals come from the V.A. Hospital, Vet Center, Veterans Welcome Resource Center in Madison, veterans groups, families, health and social service agencies and requests from the passengers themselves. Our schedule for service is Monday-Friday, 8:00 a.m. -- 4:00 p.m. with limited evening and weekend service to accommodate appointments at the V.A.

RSVP of Dane Count received a CNCS augmentation grant starting September 2012 to continue and expand our Vets Helping Vets program which started in 2011 with a one year grant from a local

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community foundation. A staff member, who is a veteran, assumed the new Vets Helping Vets Coordinator position, funded by this grant. Visits are currently being made to the VFW and American Legion posts to recruit more veteran volunteers and we are hoping to have a volunteer coordinator at each post to aid in recruitment.

The need for more drivers continues to grow as we provide more service to veterans. In 2012 we provided over 2000 rides for veterans and spouses of veterans and we anticipate providing nearly 3000 rides this year. Most of these rides are for veterans and spouses over 60 years of age. Service for younger veterans (under age 60) is also increasing. In 2012 we provided 83 rides for young veterans throughout Dane county. We surpassed the 2012 total number of rides given to our younger veterans in the first quarter of 2013 and we estimate that we will provide nearly 300 rides to our younger veterans. Our increased participation with the VA hospital and their programs is directly responsible for the increase in these rides.

A Madison spouse of a veteran states, "Thrilled to have such an option for medical appointments as I struggle with driving. Thanks! The services does keep me independent due to my inability to drive limits me. My driver was a joy to meet. He was courteous, friendly-even though my appointment went longer than they told me."

A Stoughton spouse of a veteran states, "I had 3 appointments and 3 drivers responded to the coordinator. I'm very grateful! All drivers and the volunteer Driver Escort Coordinator are very helpful and kind! My daughter is here, but ill and unable to assist me, so I'm unable to depend on her, who is a 20 year veteran herself in the Air Force National Guard. Thank you!"

In addition to recruiting veterans as drivers, RSVP also recruits veterans as volunteer recruiters to recruit other veterans and to serve in other assignments i.e. at the V.A. Hospital, as oral history presenters sharing their military experience with students, and helping nonprofit and public agencies extend their services to those in need. Our Vets Helping Vets Coordinator is a veteran and has been working hard at establishing relationships with a variety of veteran organizations to expand the volunteer service opportunities for veterans and provide additional services to veterans.

### Recruitment and Development

RSVP of Dane County celebrated its 40th anniversary in 2012. It has successfully maintained a base of over 1600 volunteers over the past 10 years. Recruitment is ongoing, and each year 200-300 new

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volunteers are enrolled. Some of the volunteers have been active for 30 years or more.

RSVP of Dane County offers a wide variety of opportunities for volunteers through 100+ nonprofit and public agencies. Program coordinators for Driver Services, Vets Helping Vets, Intergenerational, Group Projects/Homeworkers, Triad/D.A.N.E. and Community Connections offer personal placement, interviewing, placing the volunteers in appropriate assignments, and ongoing follow-up to ensure volunteer satisfaction. All staff coordinate recruitment efforts and refer volunteers with special interests, experiences, abilities, and skills to the appropriate staff member. Volunteers wishing to drive and deliver meals are referred to the Driver Services Manager. Veterans are referred to our Vets Helping Vets Coordinator. Those wishing to work with children are referred to the Intergenerational Program Coordinator. Volunteers wishing to help with safety projects are referred to the Triad/D.A.N.E. Coordinator. Those wishing to recycle/reuse materials by sewing and knitting handmade items are referred to the Group Projects/Homeworkers Coordinator. And, individuals who are interested in serving as home visitors or in other assignments with non-profit and public agencies meet with the Community Connections Coordinator.

RSVP of Dane County offers professional volunteer assignments within our office including newsletter production, brochure development, grant writing, fund development, and web based report design. We have two volunteers who work with staff to produce our quarterly newsletter. One volunteer does all the creative design and another is co-editor. This newsletter team has been working together for more than ten years. A board member who is now the Marketing Committee Chair, has been working with staff for the past two years to design new recruitment brochures. So far we have a new general recruitment brochure as well as a Vets Helping Vets recruitment brochure. This volunteer is now undertaking a new recruitment brochure for Driver Services. Another volunteer comes in twice each week to help track Vets Helping Vets statistics, write reports, and assist with grant writing. A marketing committee volunteer works to create publicity opportunities to feature our volunteers and the President of our Board has spent many hours converting volunteer report forms to a web format. Our Development Committee Chair is in charge of the annual fund campaign and also the Sweepstakes. These professional volunteers have been featured in our quarterly newsletter. We hope that their stories inspire other volunteer stations to create professional assignments.

RSVP volunteers express great satisfaction in serving young children and the elderly. Past evaluations

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show that 96% of volunteers working with young children are very satisfied that they are doing something worthwhile and making a difference; 100% of Home Delivered Meal Drivers feel that they are providing a needed service; and 80% feel the person receiving a home delivered meal will be able to stay in their home longer. Evaluation is a continuing process in all the programs to ensure that volunteers are provided a satisfying volunteer experience.

Training of volunteers is an important agency priority. Each volunteer station is charged with the task of training the volunteers. When placing volunteers in non-profit or public agencies, the Community Connections Coordinator makes an appointment with the site coordinator and meets the new volunteers at the site, introducing them to the coordinators and walking them through the site and the assignment to ensure that they feel welcomed and comfortable. Volunteers can choose to visit as many sites as they are interested in before making a commitment. The site coordinators then set up training and start times with the volunteer. Each site, depending on the nature of the assignment, offers a different kind of training, either individual or group. Often, volunteers start out in one assignment and then the site coordinators find they have other skills and strengths and offer them more or different options. Many volunteers like to be challenged to learn new skills and embrace the opportunity at sites to learn new skills. Volunteer stations often offer volunteers leadership roles to organize and train new volunteers and or coordinate projects or tasks.

RSVP Driver Services and Vets Helping Vets staff provide a one hour orientation for each driver to review policies, procedures, and expectations. Each driver receives an individual orientation to review procedures (Volunteer Handbook, Escort and Transfer Guide, Emergency Procedure, Guidelines for Car/Vehicle Safety Check, Safe Highway Habits, WI Department of Transportation Motorists Handbook, RSVP Driver Escort Policy Statement), as well as registration materials to document insurance and secure references (personal and public record background checks.) We hold driver meetings throughout Dane County to give volunteers a chance to meet with other volunteers, ask questions, and share their experiences and expertise.

Peer Support volunteers are offered semi-professional training through their volunteer station in older adult development, communication skills, psychosocial health, dementia, and grief. Volunteers in the schools are offered literacy training provided by Madison Metropolitan School District teachers.

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RSVP of Dane County volunteer demographics generally reflect the race and ethnicity demographics for the Dane County population of residents aged 65 and older using the 2010 US Census data. While 95.2% of the Dane County population over age 65 is white, 1.5% identifies as African American, 1.7% Asian American and 1.1% Hispanic/Latino. RSVP volunteer demographics reveal that African American volunteers are 2.1% of the volunteer base, Asian American volunteers are 1.8%, and Hispanic/Latino are .04% of the volunteer base.

"Continuing to build ties to minority communities and improve coordination of communication and recruiting in the community" is one of four priorities in RSVP's Strategic Focus Plan developed by the RSVP Board and staff. As outlined in our Strategic Focus Plan, the RSVP Executive Director will set up a series of meetings (starting in 2013) with directors of organizations that target minority communities in Dane County including the Urban League, and Centro Hispano to share information about our program, opportunities for volunteering and services we provide. We have had one meeting with the Executive Director of the Boys and Girls Club and will be having future meetings to explore intergenerational programming and getting information out to their network about volunteer opportunities for those 55 and older, etc. We have also met with representatives from the Outreach LGBT Community Center to discuss services to LGBT older adults.

In addition, we regularly mail announcements for volunteer opportunities to all Dane County faith-based organizations which include those with higher minority membership. Our announcements are reprinted in many of their newsletters. Each year we have recruitment tables and participate in cultural fairs including Juneteenth, a Multicultural Festival at Warner Park, and the Triangle Ethnic Fest. One of our staff members is bi-lingual and has translated some of our Vets Helping Vets recruitment and program information materials into Spanish. A teacher has volunteered to translate some of our recruitment materials for tutors into Spanish. RSVP staff have worked with the Kajsiab House, a Hmong Outreach Center for about 10 years. We have had Kajsiab House RSVP volunteers participate in a Group Project recycling/reusing materials to make handmade items, while others were part of a knitting group taught by an RSVP Volunteer. Another RSVP volunteer has been working with a group of Kajsiab House Hmong elders for the past four years teaching western quilting techniques and helping the women integrate these techniques into their work. She is helping them display their work at a quilt expo this fall. RSVP staff are also working with the Catholic Multicultural Center, which serves a diverse low income population. We are planning to recruit

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volunteers who come to the center to form a new Group Project to recycle and reuse materials to make handmade items.

We are continuing to recruit veterans as volunteer drivers for our Vets Helping Vets program, as well as other assignments. Our Vets Helping Vets Coordinator is working with veterans organizations to recruit a volunteer coordinator at each veterans organization who will help us recruit additional veteran volunteers. We also continue to recruit volunteers with disabilities. Nineteen percent of our volunteers are age 80 and older and many have some limitations. We have a wide variety of assignments and work with individuals to find a volunteer job that is meaningful to them.

In addition to volunteer recruitment efforts, we provide services to a diverse community including: rides for non- English speaking passengers referred by the North Eastside Senior Coalition; quilts, mittens, hats, scarves, and other items made by RSVP volunteers and donated to 70 nonprofit/public agencies/schools with a diverse client base including seven Head Start sites serving African American, Hispanic and Southeast Asian children; and tutors in Madison schools working with students who are primarily identified as racially diverse, economically disadvantaged and have need of specific support for school success.

RSVP staff provide regular follow-up with volunteers to ensure satisfaction. If a volunteer is not satisfied with his/her assignment, RSVP staff works with the volunteer and volunteer station to improve the situation and/or offer the volunteer other volunteer opportunities at different volunteer stations. Each RSVP program coordinator stays in touch with many of the volunteers by calling, emailing, or visiting them at the sites to find out how they are feeling about their volunteer assignments. Volunteers are assured of ongoing support, knowing they can contact RSVP staff at any time if they are not satisfied with the assignment and get reassigned if necessary. RSVP staff are also in close contact with volunteer station coordinators who know they can ask for support with any problems arising with the RSVP volunteer. RSVP staff and Volunteer Station Coordinators then work together with the volunteer to find a resolution. RSVP staff are also invited to many of the stations' volunteer appreciation events and are often asked to speak about the RSVP volunteers.

RSVP has a Marketing Committee that works to increase the visibility of our program and our volunteers. Board and committee member volunteer writers interview other RSVP volunteers and write feature stories about them. These articles are submitted to area newspapers and appear in their

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publications. It gives the volunteer writers experience in publishing their work, and it gives featured volunteers the recognition they deserve. Many of these articles are also reprinted in our quarterly newsletter, RSVP News Notes, distributed to 6,300 volunteers as well volunteer station representatives, and friends of RSVP. We also list volunteers who have received awards and publicity in our "Volunteers in the News" column in News Notes. Every issue of the newsletter contains articles highlighting RSVP volunteers serving in the community and supporting the organization as volunteer staff. Any attention brought to RSVP through publicity aids in our recruitment of new volunteers and provides recognition to our present volunteers. RSVP News Notes is also on our website. We have a committee that is planning changes to our website, which will include more recognition of our volunteers.

The Recognition Committee works year-round to plan the annual volunteer appreciation event luncheon and other forms of recognition such as birthday cards. RSVP volunteers are recognized at RSVP's annual volunteer appreciation event with two awards: the President's Lifetime Achievement Awards for volunteers serving 4,000 or more hours, and the RSVP Length of Service Awards for volunteers serving 20 or more consecutive years with RSVP of Dane County. Award winners are listed in the recognition program with their picture. Committee and board members work hard to secure publicity and feature articles in the media and volunteer gifts. Each annual volunteer appreciation event fosters great community awareness and rewards participation of volunteers from throughout the county.

RSVP of Dane County also celebrates volunteer efforts at an annual Open House event in the spring and a Veterans Day Open House in November. In addition volunteers receive a birthday post card and each year volunteer drivers receive a small calendar. Volunteer office staff and board members are also invited to a Thanksgiving celebration in our office and our giftwrapping fundraiser volunteers are invited to a party in February. In 2013 we created name badges with lanyards for our volunteer drivers and are starting to use these for more volunteer assignments. These name badges have the RSVP of Dane County logo and help create visibility and recognition for our volunteers and the program. RSVP staff members attend volunteer station recognitions each year. RSVP staff send thank you notes to volunteers and our volunteers recycling/reusing materials into handmade items receive thank you notes from volunteer stations and recipients.

## **Program Management**

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RSVP of Dane County staff respond to requests for volunteers from non-profit and public agencies and receive and evaluate requests on an ongoing basis. RSVP of Dane County staff constantly stress the importance of significant volunteer opportunities to volunteer station staff. Volunteers want to do important work and will not remain in volunteer jobs that are not meaningful.

When a new agency contacts RSVP, an appointment is made and the Coordinator meets with the agency to talk about the process, the expectations, and to fill out required forms. The agency is given a packet of information including general information about RSVP, a Volunteer Handbook, Volunteer Request form, Volunteer Job Description forms, Handicapped Accessibility form, and two Memorandums of Understanding which they are asked to sign and return one copy. The RSVP Program Coordinator asks for a tour of the facility and checks to see that the area the agency plans to have volunteers occupy is appropriate, accessible, and safe. The RSVP Program Coordinator then looks at the work assignments the agency will be assigning a volunteer and gives suggestions to the agency about appropriate expectations. When the agency completes the forms and returns them to the RSVP, they are registered in the database and the RSVP Program Coordinator can then recruit volunteers for them.

The Memorandum of Understanding and Volunteer Handbook identify prohibited activities; these are also covered in the station sign-up process. RSVP program coordinators also make periodic site visits as volunteer station personnel change and/or new volunteers are placed. RSVP outlines all program compliance requirements in the Memorandum of Understanding, which is signed by each Volunteer Station supervisor. RSVP also provides a copy of the Volunteer Handbook with periodic updates to each station. Volunteer Station Supervisors provide monthly reports to RSVP staff showing the type of volunteer activities that were performed and the number of hours performed for each activity. Any changes are noted on this report. In addition, RSVP staff make periodic site visits as volunteer station personnel change and/or new volunteers are placed.

RSVP of Dane County continues to emphasize services such as transportation for elderly and disabled individuals, supporting Veterans, as well K-12 learning and closing the prevalent achievement gap continue as priority issues in the County. The majority of RSVP volunteers are focused in these areas. New volunteer stations will be selected based on their fit with National Performance Measures. If necessary, RSVP will graduate volunteer stations with assignments outside of the National

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Performance Measures based on the number of volunteers at that station and our ability to get hours reports and necessary data. Volunteers at these stations will be offered other assignments, preferably in National Performance Measures.

For over 35 years, RSVP has provided a volunteer Driver Escort Service as well as Home Delivered Meal Drivers to Senior Centers (Focal Points) in Dane County. Dane County has contracted with us to provide this service since the very beginning and our current grant for Driver Services (transportation and meal delivery) is over \$300,000. In 2012, 697 RSVP volunteer drivers provided rides and delivered meals to help nearly 2,000 older adults and veterans of all ages and family members remain independent. Utilizing volunteers enables this service to operate at a very low cost with an estimated savings of over \$600,000 each year compared to using a contracted service. RSVP Driver Services Program and volunteers have been recognized for their accomplishments. In 1999, the RSVP Driver Escort volunteers won the JC Penney Golden Rule Award; and in 2000, RSVP received the Bill Nanninga Driver Excellence Award from the Wisconsin Rural And Paratransit Providers for "outstanding service as volunteer drivers in the area of safety, dependability, dedication and professionalism in providing transportation services to the elderly and disabled in Wisconsin." In 2009 the Driver Services Program was a winner of the Beverly Foundation STAR Award for Senior Transportation. This national award program recognizes exceptional service in providing transportation to older adults. The RSVP Driver Services Manager has assisted other programs throughout the country with problem solving and establishing volunteer driver programs.

Driver Services Program impacts are tracked continuously through passenger feedback surveys given to each rider. These are reviewed daily and any issues addressed. Also, the Driver Services Program Manager is in regular contact with the site coordinators. Statistics are tracked monthly from drivers' reports on daily activities. Reports are generated monthly and quarterly, year-end reports are also produced and used to compare prior years and make projections. In addition, RSVP's Agency Assessment Committee conducts a complete assessment every three years that includes formal surveys to site coordinators, volunteer drivers, and passengers. In the last survey, 80% of the passengers who responded indicated that this service helps keep them independent and/or living in their home longer. In addition to this question, we are now asking passengers if they believe our Driver Escort service provides them with effective help during their time of need to measure increased social ties/perceived social support.

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RSVP of Dane County was organized in 1972 and became a self-sponsored nonprofit corporation in 1977. We have a 15-member Board of Directors that meets bi-monthly and 9 standing committees. RSVP has a Memorandum of Understanding with 169 Volunteer Stations. Memoranda of Understanding are updated every three years. RSVP volunteers who are working in assignments (Driver Escort, Home Delivered Meals, Vets Helping Vets, and schools) serving vulnerable populations (children and elderly) must undergo background checks. RSVP staff perform the following background checks: National Sex Offender (NSOPW), State Crime check, Dane County Sheriff Records Check, Wisconsin Court Access System and a driver's license check through the Wisconsin Public Abstract Request System (PARS). Volunteer drivers are required to provide a copy of their vehicle insurance information for proof of insurance. In addition, we obtain two character references for volunteer drivers, asking questions about safe driving habits.

### **Organizational Capability**

RSVP of Dane County has a 15 member Board of Directors. As defined in RSVP's By-Laws, the Board provides direction, definition, knowledge, and advice in the management and operation of the RSVP organization. Responsibilities include: be accountable to itself, staff, participants, funders, and the public for competent accomplishments of Board obligations; assess the outcome of RSVP activities and monitor compliance with funders' requirements through internal reports, external reports or special studies; and hire and assure the effective performance of the Executive Director which is considered synonymous with RSVP organizational performance. The Board meets bi-monthly. Many board committees meet on a monthly basis.

Board Standing Committees and Responsibilities are listed below:

Executive Committee: Makes decisions and recommendations on behalf of the Board at times when the Board cannot meet as a whole.

Agency Assessment Committee: Conducts annual evaluations to continuously improve our programs.

Development Committee: Coordinates RSVP's "friendraising" and fundraising activities.

Financial Oversight and Planning Committee: Long Term Financial Planning, Budgeting process, Financial statement review and audit recommendations.

Grants & Funds Committee: Expands RSVP's funding base by exploring income sources: foundations, businesses, private and government grants, etc.

Marketing Committee: Increases RSVP's visibility and promote its programs to the community

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through special events, RSVP's website, brochures, flyers, media, communication systems, etc.

Nomination & Board Development: Recruits qualified candidates for the Board and help with board orientation and training.

Personnel Committee: Reviews and revises policies pertaining to personnel issues as well as conduct an annual evaluation of the RSVP Executive Director

Recognition Committee: Plans and implements RSVP's annual Volunteer Appreciation event and other recognition opportunities.

\*In addition to board and committee meetings, there is a monthly planning meeting of the Board President, Vice-President, Treasurer, and the Executive Director.

The Executive Director has participated in many CNCS training opportunities over the years and recently, along with RSVP's new Assistant Director, attended both the CNCS virtual conference as well as the Senior Corps Cluster Conference in Illinois. Both events covered compliance issues. The Memorandum of Understanding, Volunteer Handbook, Personnel Policies, and Financial Procedures Manual have been updated in 2013 to ensure compliance with federal regulations. Compliance issues are also discussed at monthly staff meetings and bi-monthly board meetings. In addition to training provided by CNCS, RSVP staff and board members participate in United Way board training and Wegner (auditing firm) training sessions on financial and compliance issues.

In May we had our Monitoring Visit conducted by our state CNCS office director. She noted many positive items in her follow-up letter including: "Evaluations and assessments that the board undertakes for three programs of the organization each year; A strong and actively engaged board of directors; Use of high quality outreach and communication materials to attract volunteers and stations; Showcasing RSVP opportunities, volunteer profiles, and success stories in your newsletter; Beginning a thoughtful evaluation of which activities of RSVP volunteers fit into the new performance measures, and how to manage the phase-down of certain activities and stations; Knowledgeable and dedicated RSVP staff, many of whom have been with the organization for long tenures; and RSVP Volunteers are very satisfied with their assignments and with the general operations of the program."

RSVP has an organizational chart distributed to board and staff that shows the agency structure including staffing, board and committees. Listed below are current staff, titles and a brief description

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of job duties:

Margaret Zutter, Executive Director: The Executive Director is responsible for the overall management of the operations of RSVP, the development of financial and human resources and the implementation of programs and services. The Executive Director reports and is answerable to a volunteer Board of Directors and is responsible for the interpretation and application of RSVP policies and procedures in accordance with the organization's vision, mission, objectives, by-laws, Board policies and applicable governmental regulations. Staff supervision responsibilities.

Paula Reif, Assistant Director\*: Works with the Executive Director to secure resources and promote RSVP. Fulfills the duties of the Executive Director in the absence of the Executive Director. Staff supervision responsibilities

Jack Guzman, Office Support Administrator: This position is responsible for the office information system including the volunteer database, office management, and administrative assistance to RSVP staff.

Krishna Sijapati, Accountant\*: This position is responsible for maintaining the computerized accounting system processing all financial statements, preparing payroll and required reports, tracking financial contract compliance and preparing required reports, coordinating the annual audit process and working with the auditors to complete tax returns, working with staff and board to prepare budgets and providing reports to the Board and Finance Committee.

Gene Kundert, Driver Services Manager: Recruits, orients and trains driver escort and home delivered meal drivers and provides supervision to the Driver Services staff.

Mike Berchem, Driver Services Coordinator/Admin. Asst.\*: Assists the Driver Services Manager in maintaining, developing, recruiting and coordinating the Driver Services program.

Robin Heilprin, Madison/Monona Ride Coordinator\*: Responsible for ride scheduling for the Madison/Monona area as well as helping with recordkeeping and statistical reports.

Tom Poppe, Vets Helping Vets Coordinator\*: Coordinates the Vets Helping Vets program, recruits and trains veterans as volunteer drivers and for other assignments, works with Driver Services volunteer coordinators to arrange rides for older veterans and schedules rides for younger vets.

Diana Jost, Intergenerational Program Coordinator\*: Coordinates the Intergenerational Program, which recruits and places volunteers serving as tutors and in other assignments working with children.

Mary Dwyer, Group Projects/Homeworker Coordinator\*: Coordinates the Group Projects/Homeworkers program which works with volunteers and recipient agencies to recycle and

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reuse materials to provide handmade items made by RSVP volunteers to agencies for their clients in need.

Jan Karst, Community Connections Coordinator: Recruits, places, and provides ongoing follow-up for volunteers serving in individual assignments in nonprofit and public agencies.

Mary Stamstad, Triad/Citizen Advocacy (D.A.N.E.) Coordinator\*: Responsible for the coordination of the Triad program that recruits volunteers to work with law enforcement on projects to prevent the criminal victimization of older adults. Responsible for the DANE Citizen Advocacy workshop series.

Akeem Torres, RSVP Volunteer Recruiter\*: Recruits volunteers for all RSVP programs.

\*part-time positions

RSVP has experienced staff including: the Executive Director (36 years), Driver Services Manager (25 years), Office Support Administrator (22 years), Triad/DA NE Coordinator & former Executive Director (40 years), Community Connections Coordinator (12 years), and Accountant (11 years). The Executive Director, Margie Zutter, started with RSVP of Dane County in 1976 as a U.W. Madison Social Work Student Intern, and was hired in 1977. Over the years she has served in various positions including Assistant Director, Interim Director twice, and programming in the areas of Vets Helping Vets, Disaster Preparedness, Group Projects as well as helping with accounting duties, grant writing, marketing, etc. Each staff member has a direct supervisor and a current job description. An annual evaluation gives opportunity for direct dialog between the staff, supervisor and executive director. The Executive Director's annual review is coordinated by the Personnel Committee and presented to the Board of Directors.

RSVP's Driver Services Manager Gene Kundert has been coordinating the Driver Escort/Home Delivered Meal program since 1988 and in 2009 received the Wes Grambsch Award from the Wisconsin Rural And Paratransit Providers for "outstanding service to the Rural and Specialized Transportation Community in Wisconsin."

RSVP has a Financial Procedures manual that details financial policies and procedures including purchasing equipment and supplies. The RSVP Financial Oversight and Planning Committee meets bi-monthly and reviews and approves budgets, including requests for new equipment. In 2011 and 2012, we upgraded staff computers, working with DaneNet, a nonprofit that provides tech support to replace the older computers with "recycled" computers. Software was purchased through Tech Soup. In addition, we were able to replace our server with a new one in 2012, and purchase a new computer

## Narratives

for our accountant.

The auditors work with the chair of the Financial Oversight and Planning Committee to conduct the annual audit and report results and recommendations to the committee and board. The Personnel Committee reviews and revises RSVP Personnel Policies, evaluates the Executive Director and assists the Executive Director with hiring and personnel management support. All other staff receive annual evaluations conducted by the Executive Director or supervising staff.

RSVP is one of four partners in Community Service Center, Inc., (CSCI), which was created in 1999 for the purpose of buying the building to provide affordable office space for partners and nonprofit tenants, reducing overhead and operating costs for participating agencies. The CSCI Board works hard to keep costs down. The in-kind value to RSVP of the subsidized rent from CSCI is \$15,625/year.

RSVP of Dane County has over 40 years of experience managing federal funds. RSVP uses Quick Books for its accounting system. Our accountant has over 10 years of experience and is supervised by the Executive Director with 30+ years of experience in managing our federal grant. In addition, two volunteers help with some accounting duties: one volunteer assists staff with deposits, and another volunteer issues the volunteer transportation and Driver Services reimbursement checks using Quicken software. The Treasurer of the RSVP Board reviews the on-line bank statements every month and also credit card statements.

RSVP has annual audits by an outside audit firm. The audit results have been consistently clean and accepted by other government funders.

### **Other**

N/A

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

N/A