

# Narratives

## Executive Summary

An estimated 428 Monterey Bay RSVP volunteers will serve our community through volunteer opportunities at 68 partner agencies in the tri-county area. Due to the needs of our community, we have chosen the Primary Focus area of Healthy Futures, Aging in Place. Our activities will include providing healthy meals, transportation to medical appointments, companionship and minor home repairs to homebound and disabled seniors. In addition, our volunteers will provide services to the community with a focus on At-Risk Ecosystems, Disaster Preparedness, Veterans Services, as well as other community priorities.

At the end of the 3-year grant, we expect to have the anticipated outcomes in our Primary Focus Area as follows: (1) At least 900 out of 1500 seniors and individuals with disabilities who receive four healthy meals a week (2) 120 out of 200 seniors and individual with disabilities who received 4 to 6 rides per month to medical appointments; (3) 80 out of 150 homebound seniors who receive an average of one visit per week; and (4) 200 out of 250 seniors who receive minor safety home repairs will report increased perception of social ties and social support.

The CNCS federal investment of \$66,206 will be supplemented by \$72,113, which will come from local funding sources, including business partners, individual donors, fund raising events and private foundations. Monterey Bay RSVP will provide a 52% match, which is 22% greater than the required 30%. As RSVP exceeds its' 30% match, neither federal CNCS or matching funds will be used to reimburse the Program Director's 10% FTE excess time on fund raising activities.

## Strengthening Communities

The Monterey Bay RSVP serves California's Central Coast communities of Santa Cruz, Monterey and San Benito Counties with a total population of about 750,000. Comprised of approximately 5769 square miles, the tri-county area is slightly larger than the state of Connecticut. It is mostly an unincorporated rural area with 18 incorporated cities and towns, the largest having a population of 150,000.

Four principal industries form the backbone of the economy: agriculture, tourism, government and education. Due to the production of salad greens, broccoli, strawberries and a variety of other crops, this region is known as "the Salad Bowl of the World". Our areas' environmental treasures support a

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vibrant tourist industry. The region is home to the Monterey Bay National Marine Sanctuary, many State Parks featuring giant redwoods and numerous hiking trails, Big Sur, Elkhorn Slough, and the Monterey Bay Aquarium. Civilian and military government employment is also a part of the economy. The area is home to the Defense Language Institute, the Naval Post Graduate School, Fort Ord, Camp Roberts and Fort Hunter Liggett. Two major state universities, University of California Santa Cruz and California State University Monterey Bay, as well as other educational institutions, employ a large sector of the labor force in the region.

As our labor force ages and retires, our senior and veteran population grows. Currently, 17% are over 60 years of age. This number is predicted to grow to more than 20% in the next twenty years, shifting the community needs and services to an aging population. There are also about 34,000 veterans living in our service area. 15% of these receive government benefits and over 5% are homeless, requiring mental health services, health care, food and shelter.

Another unique characteristic of our tri-county region is that in the past 25 years, it has been the site of 5 federally declared disasters and 3 state declarations of emergency. Under FEMA designations, the Monterey Bay RSVP service area is a high-risk earthquake zone along with many areas being designated as high-risk flooding and wildfire zones. In 1989, the Loma Prieta earthquake killed several people, damaged over 31 buildings, and displaced many individuals and families who lost their homes. In Santa Cruz County, the Lockheed Fire burned 7000 acres, while in Monterey and San Benito Counties, the Gloria Fire burned over 6400 acres and cost the counties over \$4 million. The California Department of Water Resources states that the City of Watsonville, the unincorporated town of Pajaro, and surrounding agricultural areas in Monterey and Santa Cruz Counties are subject to flooding. Yet according to community assessment surveys, only about 57% of our community are prepared in the event of a disaster.

Due to these factors, our community supports environmental initiatives that protect our agricultural lands, state parks, wetlands, sloughs and other natural habitats. Our Monterey Bay RSVP also focuses on supporting disaster preparedness through several partner agencies. Additionally, it places and supports volunteers to provide services to veterans' organizations within the tri-county area. However, the primary focus for Monterey Bay RSVP is on our seniors aging in place due to the many economic challenges they face.

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According to the Santa Cruz and San Benito County Seniors Council Senior Needs Assessment, as well as Monterey County's Area Agency on Aging report, seniors in our community face many challenges. Both assessments cited several significant issues for seniors in our community: food delivery and security; transportation costs and availability; and housing maintenance and affordability. Seniors reported that they were also concerned about health care access, understanding their coverage and costs, particularly prescription and dental care affordability. Other issues cited were economic security, legal and protective services, mental health and isolation, caregiving options and provisions, and services for LGBT elders. In addition, it is estimated that 44% of the regions' senior population are living with a disability.

In Santa Cruz County 7% of seniors live below the Federal Poverty Level (FPL) and 42% live below the Elder Economic Security Standard Index (EESSI). In Monterey and San Benito Counties, the rates are even higher, with 7.8% of seniors below the FPL and 43% who live below the EESSI. Through assessment surveys, 1 in 3 respondents reported that buying food was a challenge. Many relied on services such as Meals on Wheels and Grey Bears food delivery to avoid hunger and malnutrition. 40% stated that home repairs and maintenance is key for them to remain in their homes (aging in place), while 20% of those surveyed stated that transportation is a challenge. Transportation issues ranged from car expenses, to isolation and loss of independence when they have to stop driving. About 39% reported that is "very difficult to secure affordable medications and medical treatment" (Senior Needs Assessment). Some seniors must choose between medication and food. These statistics indicate that over 86,000 seniors in our community cannot afford basic needs, such as housing, food, and healthcare. Many of these are homebound or isolated because of their disability or lack of transportation. Due to these community needs RSVP has chosen Healthy Futures as the primary focus area.

To improve nutrition for seniors and individuals with disabilities, 95 Monterey Bay RSVP volunteers will deliver on average 4 healthy meals each week through 11 Volunteer Stations. Delivery of 4 healthy meals a week will improve the quality of life and the ability to continue to live independently for 1500 clients. About 900 or over 60% will report that meal delivery service increased their perception of increased social support. Forty-one volunteers through 6 Volunteer Stations will transport homebound seniors and disabled individuals to medical appointments. 200 clients will

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receive on average 4 to 6 rides a month. Due to these rides, clients will reduce their feelings of isolation and at least 120 will report that they have experienced increased social support in their daily lives. In addition, 25 Monterey Bay RSVP volunteers will provide companionship services to 150 homebound seniors and individuals with disabilities in the tri-county area. These volunteers will work with 6 Volunteer Stations to provide social support, peer counseling and assistance with navigating legal and/or benefits issues. Visits to clients will occur on average once a week as needed. Due to the weekly visits, 80 of those clients will report an increase in social ties and perceived social support. Lastly, our Helping Hands program will mobilize 18 volunteers to provide minor home repairs essential for keeping seniors and individuals with disabilities safe in their home, such as installing grab bars, smoke alarms and repairing railings and steps. Services will be provided in the home to 250 clients. Over 80% or at least 200 clients will report an increase in social support because of the installation of safety devices, which contribute to their ability to age in place.

For our Primary Focus Area, Monterey Bay RSVP Food Delivery service activities outcome measurements will be tracked by quarterly activity logs showing the number of clients receiving meal delivery services to promote independent living. The logs will be submitted by each of the 11 Volunteer Stations that provide food delivery. In addition, the stations will distribute and collect client performance measurement surveys on a quarterly basis, returning the surveys to the Monterey Bay RSVP office for data collection. Transportation service activities will be monitored by activity logs, which track the number of clients transported to medical appointments. 6 Volunteer Stations will submit the activity logs on a quarterly basis. These stations will distribute and collect client performance measurement surveys on behalf of Monterey Bay RSVP. Data will be collected from the surveys on a quarterly basis. In support of the Companionship Performance Measure, 6 volunteer stations will provide data on the number of homebound clients that receive home visits, including peer counseling, and assistance with legal and benefits issues. Each station will report data using quarterly activity logs. To provide outcome data, each station will distribute and collect client performance measurement surveys. Surveys will be returned to the Monterey Bay RSVP office on a quarterly basis for data collection and management. For our Helping Hands Senior Home Repair Program, quarterly reports will show the number of clients who received minor home repairs. Client performance measurement surveys will be distributed upon completion of the home repairs. Upon collection of the surveys, they will be submitted to Monterey Bay RSVP on a quarterly basis.

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For our Other Focus Area, At-Risk Ecosystems, outputs for all service activities (rebuilding riparian buffers, natural and unnatural debris removal, invasive species removal and general trail improvements) will be collected through quarterly reports from a total of 15 Volunteer Stations. The reports will collect data on the number of park or public land acres improved for each service activity. In the Disaster Recovery Focus Area, 4 Volunteer Stations will monitor the number of individuals that received CNCS-supported services in disaster preparedness in the following service activities: training, disaster kit creation and receipt, and outreach events. The stations will submit reports to Monterey Bay RSVP on a quarterly basis. Finally, Monterey Bay RSVP community priority service activities will be monitored by volunteers providing monthly mileage and timesheets. Hours served will be confirmed by the Volunteer Stations on a quarterly basis.

There are two Volunteer Stations that serve Veterans, providing support services to clients in rural communities and other community-based activities. Volunteers placed in these agencies will provide information and referral services, as well as facilitate appointment scheduling. Volunteers will provide mileage and time sheets to account for the number of hours they volunteered at the Volunteer Stations. Hours will be confirmed by the Volunteer Stations and will report how many veterans our RSVP volunteers served. Veterans served by Healthy Futures Aging in Place service activities will have the option of stating they have veteran status on client intake forms. Monterey Bay RSVP will collect this data from each station on a quarterly basis.

### **Recruitment and Development**

Monterey Bay RSVP provides high quality volunteer assignments through a number of volunteer management best practices. Firstly, we select agencies that have quality opportunities and assist them in developing well-defined volunteer job descriptions. Volunteers are able to select these opportunities online through our Hands on Connect volunteer data management system or have a personal match appointment. When matching RSVP volunteers with opportunities, our volunteer mobilization team helps volunteers choose areas of service that are of interest to them and uses their skills and abilities in a way that fosters their sense of service to the community. After placement, RSVP engages the volunteers through regular communication mainly through e-mail and e-newsletters. RSVP encourages volunteers to share their experiences and provides the e-newsletter as a forum to recognize volunteers, as well as update volunteers on new partner agencies and new volunteer opportunities.

In general, the Volunteer Station provides volunteers the necessary training and support for

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performance of their assigned tasks. However, the Monterey Bay RSVP does provide assistance to the Stations for writing volunteer job descriptions, including training details. Some agencies provide orientations prior to placement, while others provide lengthy trainings over a specified period of time. All volunteers are informed of any training events before accepting the position. Volunteer Stations may also receive instruction on volunteer management practices, including training methods from our Volunteer Mobilization team.

The tri-county area is a diverse community. One of our goals is to have our volunteers match the diverse demographics of seniors in our community within +/- 3%. The current RSVP volunteer composition of 4% Asian, 4% African-American, 79% Caucasian, 9% Latino and 4% other has met this goal in each of the last 5 years. In addition, 45% of the population speak more than one language. Spanish is the second most spoken language after English. Therefore our brochures and flyers are printed in both English and Spanish. We have MOUs with placements that reflect both linguistic and cultural diversity. An example is our partnership with the Diversity Center, an advocacy agency for the LGBT (Lesbian, Gay, Bisexual, Transgender) community in our geographic region, as well as the Literacy Program, which provides English language instruction to many Spanish-speaking clients. In such a large territory as the tri-county area, we endeavor to partner with community agencies that reflect the diversity of the geographic region, as well as provide volunteer opportunities that appeal to a diverse volunteer pool.

Monterey Bay RSVP is one of 22 programs housed within its sponsor agency the Volunteer Center of Santa Cruz County. Due to this we have a very diverse staff. We have 8 employees who speak Spanish fluently, as well as two who speak Italian and one who speaks Russian. This enables us to field inquiries by phone and walk-ins should the need arise.

Monterey Bay RSVP retains our volunteers by communicating through email and phone calls, asking our volunteers to share their experiences and make sure they have everything they need to be successful in their current volunteer position. In our quarterly newsletter, we share volunteer success stories, post new volunteer opportunities, and feature new partner agencies. We provide information on services and training for our senior volunteers, such as tax preparation and our Senior Tech Days, a program where youth from our YouthServe program assist seniors with technology. Currently, Monterey Bay RSVP is in the process of implementing quarterly gatherings where volunteers can

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meet others who share their passions. Gatherings may be topic or interest-area oriented and could feature a speaker from our partner agencies. They will also be a place that volunteers can share their experiences with other like-minded RSVP volunteers.

Monterey Bay RSVP recognizes our volunteers in a variety of ways. Besides feature articles in our e-newsletter and on our website, quarterly we honor a volunteer with a \$25 gift certificate to a grocery store of our volunteers' choice. Annually, we host a volunteer recognition luncheon, where volunteers and non-profits agencies are honored for excellence. Proclamations from Sam Farr's office (our Congressional District Representative) are given to our outstanding agencies and volunteers from each of the 3 counties we serve. Volunteers also receive awards for their services, such tickets to an airshow, certificate to a restaurant, and other various gifts provided by in-kind donations from our business supporters.

Monterey Bay RSVP also participates in the Be The Difference Awards, an annual area wide event that honors individuals, non-profits, and businesses that have chosen to make their moments matter and transform our community through volunteerism. Our Monterey Bay RSVP staff attends recognition events at the various tri-county area Volunteer Stations to support recognition of our volunteers.

### **Program Management**

Our integrated database allows us to track volunteers and assignments at 68 Volunteer Stations in all 3 counties of our Service Area with information by geographic or Program Focus Area. Original signed Memoranda of Understanding (MOU) and other pertinent documents from our Stations are kept in locked files. Agency outreach materials for potential new stations describe roles, responsibilities, benefits and prohibitions, and are also available as PDFs on our website. Memoranda of Understanding are signed by each agency prior to placement of any volunteers, and these too articulate roles, responsibilities, benefits, federal regulations and prohibitions. Prospective New Stations have an Orientation Visit from a staff member to review the information prior to becoming a Station, and all stations have a site visit at least every two years when MOUs are renewed. RSVP stations are eligible to receive other support and services from the Center's Agency Support Team, including training and support in our online recruitment and matching platform, our Agency Volunteer Management Newsletter, our Volunteer Needs Assessment Tool and our Volunteer Opportunity Quick Submit form for new volunteer assignments.

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RSVP staff contact Stations regularly to assign new volunteers, stop by for visits or pick-up volunteer logs, leading to a close, cooperative relationship. Each volunteer is assigned not only to a specific Station, but also to a particular Volunteer Opportunity, which is listed on our website. We regularly confirm performance of assigned duties through collection of volunteer timesheets, which may be submitted online in our Hands On Connect volunteer data management system, through the mail by the volunteer, or through Station submission of volunteer activity logs. This specific information is entered into our database and reviewed at least quarterly, and then compared to our goals. We know from experience that our RSVP members donate an average of 250 hours per volunteer each year, which is 5 times the national average for all volunteers and 2.5 times the national average of 90 hours for people over 65, according to the Bureau of Labor Statistics. We believe this is strong evidence of the quality of the support, training and oversight we give to our Stations and our volunteers.

Our current volunteer deployment is aligned with National Priorities (70% of volunteers) and other Community Needs in Criminal Justice, Libraries and Economic Support through Thrift Stores (30%). We are graduating a few stations that have no current volunteers assigned, so we will be meeting or exceeding the Focus targets with no disruption of current volunteers. For local needs, the Volunteer Center is a sponsor of the Regional Community Assessment Project and we use this information in our own Strategic Planning. As we grow our placement opportunities, we will bring on new stations that are aligned with our CNCS Focus areas and Work Plan priorities. Requests for volunteers from non-aligned agencies will be handled by our general Volunteer Mobilization Team, not RSVP.

We have 24 partner agencies and our highest concentration of volunteers assigned (42%) to the Health Futures Aging in Place Focus Area. This is an area of programming excellence for Monterey Bay RSVP. Our Volunteer Center oversees many model programs in Santa Cruz County designed to engage volunteers to help elders and people with disabilities maintain or increase their independence -- including Helping Hands Home Repair, Volunteer Transportation Program, File of Life and Community Connection Mental Health Programs. Debbi Brooks, our RSVP Director, is a member of our County's ParaTransit Advisory Task Force for Elderly and Disabled Persons. Our Volunteer Center's Monterey Bay RSVP program is a member of the Area Agency on Aging for San Benito and Santa Cruz Counties. Monterey Bay RSVP has developed robust outcome and other performance tracking systems in this area, so all volunteers assigned to the Primary Focus Area will be in positions

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ted to Outcomes -- that's 4 times the required 10%.

Our RSVP Advisory Committee has broad representation of current volunteers and community leaders from every part of our Service Area. They meet quarterly to provide oversight, as well as plan and execute our annual Volunteer Recognition Event. We plan to expand membership and increase their roles in fundraising by hosting a new fundraising event. The former Board Chair of the Volunteer Center has joined the Advisory Committee and is serving as Event Chairperson, with a goal of raising an additional \$5,000 to support RSVP. We will continue to have 100% compliance with current MOUs for all stations. All prospective RSVP Members complete and sign an enrollment form that screens for eligibility, and eligibility criteria are discussed on all recruitment materials and on our website.

### **Organizational Capability**

The Volunteer Center's Corporate Compliance Policy, which governs our approach to management and oversight, states: "The Volunteer Center is committed to meeting high standards of quality, transparency, performance, safety and accountability for all our activities, programs and business practices. The goal of our Corporate Compliance Program is to insure compliance with all relevant local, state and federal laws and regulations.

We strive to maintain a high-performance culture in RSVP, and all of the 22 programs the Center sponsors. Because we manage so many programs, we have robust systems for operations and oversight in finance, risk management, performance management, contract compliance and volunteer management with specialists in each area that are available to work with RSVP. The costs for access to these high-quality tools, systems and personnel are minimal to RSVP, as they are a function of the overall Volunteer Center operations. Programmatic Oversight Capacity includes monthly tracking of placements, hours and outcomes in a FileMaker Database that are reviewed with Senior Leadership from the Volunteer Center. Quarterly Activity Reports compare Year to Date Activity with Goals and prior year performance. The Advisory Committee and Board of Directors review the Quarterly Activity Reports. As a result of this infrastructure, we have exceeded our RSVP Required Performance Measures in volunteers, hours, stations, cash and in-kind match every one of the past 15 years.

We practice stewardship of resources through joint purchasing and bulk discounts for technology,

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office and program supplies, insurance and our sites. We rely on communication technology and our strong partnerships in all three counties to enable us to cover such a large, rural area with such a comparatively small cost per volunteer. Partner agencies in all three counties provide free or low-cost meeting space, recruitment assistance and help with reporting. We have a strong and committed group of business, individual and Foundation donors who provide cash for the local match, and in-kind resources for volunteer support and recognition.

Our RSVP team is comprised of seasoned experts who understand volunteerism, our community and the requirements of CNCS for Senior Corps. Program staff is lead by Debbi Brooks, our RSVP Director with 25+ years as a Program Coordinator at our Center and has been RSVP Director since 2005. She is responsible for grant and budget management, partner agency management, community outreach, volunteer leadership and Advisory Committee support. Program Assistant Carol McGuire has 16 years of experience with RSVP and is responsible for volunteer and agency station support and communication, and assists with outreach. They are supervised by Associate Director Lois Connell, who has 25+ years experience with our Center, and was formerly both our Government Volunteer Coordinator and RSVP Coordinator. Kathryn Packard, our Bookkeeper with 20+ years of experience has 17% of her time assigned to RSVP to provide all accounting functions.

We make extensive use of volunteers as well, with Volunteer Matchmakers conducting interviews with perspective volunteers; assisting with data entry and communication; and we plan to extend this to train volunteers to staff outreach stations in the community and conduct agency site visits as well, as part of our Center's overall mobilization strategy. We are already using AmeriCorps Volunteers for these activities, and plan to extend this to RSVP volunteers.

For 45+ years, our Volunteer Center mobilizes volunteers to transform our community for the better. We are one of the largest, most well-respected Centers in the nation - engaging 9,900 volunteers last year who contributed almost \$9 million worth of labor. A benefit of the Volunteer Center's sponsorship of RSVP is access to, and support from our core teams who are experts in various elements of volunteer recruitment, agency capacity building and management. Outreach and Capacity Building for RSVP partner agencies is part of our overall Volunteer Mobilization Agency Support Team that works with 570 agencies per year. Our Hands On Connect volunteer management website and our overall Communication and Outreach Team reaches 40,000+ people a year. Risk

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Management, Human Resources and Corporate Compliance are handled by our Associate Director, with oversight from our Personnel Committee. Clerical support, equipment management and purchasing are handled by our Office Manager; and fundraising assistance by our Executive Director and Board of Directors. We have bilingual, bicultural staff and volunteers available to RSVP for translation, and IT support through our Technology Team as well. Access to these agency tools and resources is provided without cost to RSVP because we see RSVP as central to our mission of providing one-stop resources about volunteering to the people, businesses and agencies of the Central Coast.

The Center has a budget of over \$3 million, with almost \$700,000 in Federal Grants from the Departments of Education, Rehabilitation, Older Americans Act/HHS and FEMA, as well as CNCS funding for AmeriCorps and RSVP. We have annual A-133 Audits by an Independent CPA, and have not had a material finding or questioned cost in over 25 years. We have a Financial Management Team of a Bookkeeper, Account Clerk and Contract/Budget Analyst that report to the Executive Director. Budgets are approved by the Board of Directors for each Program; monthly line item Budget to Actual statements are reviewed by Program Staff, Senior Leadership and the Finance Committee; Summary Financials are presented Quarterly to the Board of Directors. We just completed a review/update of our Accounting Manual to insure it complies with GAP (General Accounting Practices) for Nonprofits.

### **Other**

n/a

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

n/a