

# Narratives

## Executive Summary

An estimated 1,583 RSVP volunteers will serve. Some of their activities will include companionship, food delivery, disaster preparedness training, veteran assistance in accessing state and federal benefits, and environmental plant establishment or removal. The primary focus area of this project is Healthy Futures. At the end of the three-year grant, 360 clients will be provided companionship services, which support the clients' aging in place. The CNCS federal investment of \$101,578 will be supplemented by \$155,971.

## Strengthening Communities

Healthy Futures is the Primary Focus Area for the San Diego County RSVP grant with a particular emphasis on helping older adults to age in place. San Diego County is home to 361,908 older adults age 65 and older, which is 11.6% of San Diego County's total population (San Diego County Senior Health Report, 2013). The San Diego County Senior Health Report identified that 41.7% of older adults are living alone in San Diego--considerably higher than the national average of 28% (U.S. Department of Health and Human Services, 2012). Furthermore, unintentional injuries were among the leading causes of death for older adults in San Diego County. The most frequent unintentional injuries are falls. Older adults who are living independently and are medically fragile, disabled, and/or homebound are at risk for falls. Members of this population who do not have a stable support network of friends or family are at particular risk of injury or death. Serving this vulnerable population is a priority for our community. The need to support vulnerable seniors who are aging in place will become greater as the population ages.

San Diego County is over 4,000 square miles (U.S. Census Bureau) and thus requires a significant number of volunteer stations, volunteers and community collaborations to provide support and deliver services to vulnerable individuals. Many of these individuals live alone and several receive contacts up to five times a week made by RSVP volunteers. It is in the community's best interest to help older adults who want to live independently do so. The costs to care for older adults in institutional settings can be staggering and many strata of the community are impacted, both financially and in terms of capacity. Most importantly, older adults want to enjoy their quality of life and stay in their homes as long as possible rather than be in an institutional setting. However, they also want a sense of security that someone is checking on them. Supporting vulnerable older adults so that they can age in place is a pressing community need. Aging & Independence Services (AIS), the San Diego County RSVP grant

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sponsor, considers this community need a Primary Focus area and has committed to strengthen efforts to support vulnerable adults in the community.

Older adults, homebound adults and those with disabilities who are in need of support in order to live safely and independently in their homes will be provided with companionship contact by RSVP volunteers on a regular basis. In order to respect the right of the individual to make decisions about care and support, the type of contact, phone (person contact not computer call) or visit, may be determined by the recipient. The frequency of contact is also self-determined by the client. However, the minimum schedule for contact is weekly. If the RSVP volunteer is unable to make contact by phone or home visit, there are protocols in place to activate police in order to evaluate the status of the client and to ensure that they are well and not in distress. If there is an issue with the client, emergency medical help can be alerted. Sometimes the contact prevents the client from becoming a news story about a person who died because they didn't receive help soon enough. For example, a current RSVP companion client, who has uncontrollable diabetes, requested contact at a specific time of day, when his blood sugar is most likely unstable. On one visit, the volunteers did not get an answer at the door and went around the house looking in the windows and saw him on the floor. Emergency medical personnel were able to treat him. This client still remains at home and is able to live independently and not enter a care community. Other RSVP volunteer visitors have also reported finding clients on the floor, unable to get up, suffering from an injury or illness. Companionship with a capital "C" provides an improved quality of life by reducing the senior's social isolation. Our volunteers offer a helpful social tie and assurance that clients have support so they can stay safely and independently in their own homes.

RSVP Volunteers will also provide information on additional resources to support the older adult in independent living, which may include the Aging & Independence Services Call Center phone number. The Call Center staff screen callers for eligibility for assistance programs that would further support independent living and also provide information. An example of one referral may be to an organization providing food delivery services in the older adult's geographic area, which provides a basic life necessity to support some older adults in living independently and aging in place.

Food delivery will be another RSVP activity in the Healthy Futures area that supports aging in place; however, only outputs, not outcomes, will be measured. Clients, who receive food delivery services,

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may not be able to afford, obtain or prepare their own food. Therefore, without food delivery they would not be able to live independently in their own homes. The frequency of delivery is five days a week. Food delivery is currently an activity area with a few volunteers for the San Diego County RSVP project, but it will be an area of growth focus for the project during the coming Grant award period.

There is an established system for participating volunteer stations to report to the RSVP office staff the unduplicated number of clients served, number of contacts, active volunteers and volunteer hours. The largest participating law enforcement agencies with volunteer stations have modified their information systems to enable detailed reporting to the RSVP project office. These volunteer stations report the number of unduplicated clients served in their companionship program, which is called YANA (You Are Not Alone). Other smaller programs, which may provide companionship and/or food delivery, have more simplified systems to generate the report information. Similarly, other volunteer stations that provide service in other focus areas utilize simpler methods. Multiple volunteer stations with different organizations have varied modes of conducting their business. In order to accommodate these varied systems and relieve added reporting burdens, there is flexibility built into the RSVP San Diego County system to accept report data through email, fax and regular mail from verifiable sources. When reports are submitted, the data is reviewed by RSVP project staff. Any questions that arise during the review process will be resolved with the volunteer station or volunteer before the process moves forward. After review, data is entered into the volunteer data management software to capture and save data for future reports and analysis. Additionally, the data may be summarized in an Excel spreadsheet if necessary. After the completion of data entry, the original hard copy reports are filed in the RSVP department as backup to the electronic system.

The volunteer management software also allows for the creation of many types of summary reports including volunteer activity, hours served, activities performed and the number of clients served. RSVP staff generates monthly reports to monitor that each volunteer or volunteer station has submitted the required report information. Follow-up phone calls are made to any station or volunteer who has not submitted their monthly information. Yearly, a survey of companion clients is conducted to determine how they feel about the services they are receiving. They are queried to determine if their perception is that these services are enabling them to live independently longer and if they feel more socially supported and connected. In the 2013 client survey, 95% of the respondents reported feeling

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safer in their home and confident that they would be able to stay in their home longer with the support received.

Veteran and veteran families are served through the Primary Focus Area (Healthy Futures), as well as the Veterans and Military Families and Disaster Services Focus Areas. Due to protection of confidentiality and privacy for the current Healthy Focus clients, it is unknown how many veteran or veteran family members are currently receiving services through the focus activities. The veteran and veteran family statistics will be determined in the Primary Focus Area from an anonymous survey that is conducted yearly as part of the ongoing project. The clients will be asked an additional question to indicate veteran or veteran family status. There are currently 228,000 veterans in San Diego County (County Veterans Services) which would support the expectation that a sizeable number of veterans and veteran family members are currently served in the Healthy Futures client base.

In the Veterans and Military Families Focus Area, veterans are served by the San Diego County Veteran Services RSVP volunteers. Veterans and veteran family members are assisted with basic information regarding benefits and assisted in filing for benefits and appeals. Assistance may be delivered over the phone or in person at the Veteran Services office within Aging & Independence Services, or at locations conveniently positioned throughout the county. Veterans or their families often are not aware of benefits that are available to them. Furthermore, families may need assistance because the veteran or another family member may require support in securing disability or education benefits, or simply assistance in navigating the aging process. In 2012, RSVP Volunteers averaged 27 unduplicated contacts with veterans or veteran family members per month. As a result of RSVP Volunteer efforts in the last year, claims were filed resulting in 59 awards to date (claims can take over a year for a ruling) totaling over \$500,000. This success was the direct result of RSVP Volunteers using their skills and knowledge in the Veteran Services office. Although volunteers serve both veterans and veteran family members, service to veterans will be the activity counted as output in the Veterans and Military Families Focus Area.

In the RSVP Disaster Services Focus Area, veterans and veteran family member RSVP volunteers will have the opportunity to participate in disaster preparedness training. They will learn the basics of individual disaster preparedness and be equipped to share the information with their families, friends, and volunteer stations. Upon completion of the initial training, volunteers will have the opportunity

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to pursue higher levels of disaster preparedness education and be given options of volunteer sites in which to serve in a disaster. In year two and year three, they will receive more advanced preparedness training based on Federal Emergency Management Agency (FEMA) training materials. San Diego County is a region that has experienced two disastrous brush fire seasons and an eleven hour power outage, all within the last ten years. Thus, disaster preparedness is a necessity for the entire county.

An extensive outreach effort is conducted throughout the county by RSVP staff and other Aging & Independence Services staff to educate veterans on available services and to recruit them for RSVP volunteer service. Two large outreach activities focused on veteran and military families include events at the Naval Medical Center San Diego (nationally recognized with a potential of 250,000 beneficiaries) and the Retired Military Seminar and Resource Fair. The Resource Fair is attended locally by over 1,700 veterans and soon-to-be veterans. This outreach not only informs veterans and family members of services available, but is a recruitment strategy for veteran and veteran family members to become RSVP Volunteers. These efforts have been very successful. Currently 575 San Diego County RSVP volunteers are identified as veterans.

### **Recruitment and Development**

In order to reach as many volunteers as possible with diverse skills, interests, cultural backgrounds, races and ethnicities, the recruitment plan for RSVP is varied and extensive. Outreach recruitment is conducted utilizing multiple methods. Potential volunteers are recruited at conferences, seminars, health fairs and community events. One example of a large recruitment opportunity is the annual Aging & Independence Services (AIS) sponsored event with over 1,500 attendees. Recruitment is also conducted through the web and print media. RSVP also recruits in the AIS monthly newsletter. In the newsletter is a page devoted to recognizing RSVP volunteers, spotlighting volunteer stations and announcing volunteer opportunities at various stations.

The RSVP project has a web presence on the San Diego County Volunteer site and receives potential RSVP volunteer inquires. The RSVP project also has a website under development. The AIS Call Center, which received up to 5,000 calls a month from older adults, homebound, disabled individuals and family members, refers potential volunteers to RSVP. Since RSVP San Diego County is sponsored by AIS, the designated Area Agency on Aging, organizations familiar with AIS approach RSVP to become volunteer stations in the program. Recruitment and choice of RSVP Volunteer Station

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partnerships is done strategically with the RSVP focus area needs and other significant community needs as the primary criteria. The organization must meet the criteria for RSVP Volunteer Stations, have the capacity to provide the necessary reporting documentation, and work in a partnership with RSVP team.

Within the wide geographical and organizational selection the 90 current volunteer stations offer, volunteers are afforded many choices and flexibility with regards to volunteer assignments. It is important to recognize that individual volunteers not only have different skills but different ability levels also. Having a wide selection of volunteer stations and activities maximizes volunteers' ability to pursue their interests and also to serve in a high quality volunteer job that best utilizes their abilities and experience. In order to effectively meet the needs of volunteer stations, volunteers with diverse and varied skills sets are sought after. A greeter at the local museum may have developed interpersonal and communication skills that are needed for interacting with the public. The exhibit designer at the local military carrier museum may have research, organizational, design and project management skills. A companionship visitor from a law enforcement organization will have honed their skills with one to two weeks of training in regulations and procedures, including hands-on exercises such as using the radio to call in an emergency. Volunteers serving veterans receive one week of intensive training with options to continue training to become certified. RSVP and Community Unit Programs (RSVP is a department within this Unit) staff work hard to recruit a varied team of RSVP volunteers who bring unique skills and gifts. Last year this team did outreach and recruitment at 106 events and health fairs touching almost 15,000 San Diego County residents.

RSVP volunteers are given basic volunteer orientation and training using the San Diego RSVP Handbook. The volunteer stations provide job training at their individual sites specific to the level of knowledge and skill required for the position. One example is the law enforcement companions in the Healthy Futures Focus Area. These volunteers receive one to two weeks of training on-site, delivered by training coordinators, officers within the law enforcement agencies and RSVP staff. As previously mentioned, volunteers serving veterans in the Veterans and Military Families Focus Area receive a minimum of one week of training, delivered by certified trainers in the San Diego area, with the option of additional Certification training delivered twice a year at different locations around the country. Environmental Stewardship Focus Area volunteers received training from the professional staff of their organizations to enable them to perform at the most effective and efficient level possible

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and to increase their knowledge level relevant to the habitat where they are working. In the Disaster Services Focus Area, the training the RSVP volunteers receive is a collaboration of the Office of Emergency Services (OES) for San Diego County, the retired Deputy Director of Environmental Safety for San Diego County and FEMA based curriculum. All the Disaster Services volunteers are trained with curriculum developed by the OES and FEMA and are given the opportunity to pursue advanced training to become certified emergency responders. Training is conducted by OES trainers and experienced emergency preparedness trainers from the community. At training sessions, volunteers are connected with resources and encouraged to complete Community Emergency Response Team (CERT) training in their own geographical area. Localized training is part of the CERT plan. There is also additional specialized training available. For example, if a volunteer chooses to assist 2-1-1, the phone and web-based information and referral network that serves the entire region with community health and disaster services, they will receive training pertinent to that organization and be eligible to volunteer in an emergency. The varieties of training available are designed to provide the volunteer with opportunities to use their abilities and knowledge at the highest level possible.

The RSVP project currently surveys volunteers to determine the level of volunteer satisfaction with the training they receive for their particular volunteer service. One of the questions the volunteer survey asks is specifically designed to evaluate the volunteer's satisfaction with the level of training they receive for their volunteer duties. Of the volunteers participating in the 2013 survey, 99.6% responded that they were satisfied or very satisfied with their volunteer service training.

RSVP volunteers are representative of a diverse county. According to the State of California Department of Finance 2010 statistics, there are 681,041 individuals in San Diego County over the age of 55. Of those 681,041 individuals, 67.01% are classified as white with 32.99% in other racial categories. RSVP currently recruits and will continue to recruit across the County of San Diego and at events taking place within diverse communities. The project's diverse Advisory Council also promotes RSVP volunteerism within their ethnic and race based organizations. The project will also seek diverse ethnic volunteer stations to participate in RSVP to encourage additional diversity among the volunteers.

Veterans, military and their family members represent a significant segment of the County of San

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Diego, which is reflective of the large veteran and active duty military presence in the county's communities. In addition to veteran and military attendance at general events throughout the County where RSVP conducts recruitment, RSVP also conducts focused recruitment at military and veteran events. One example of a large, annual focused event is the Retired Military Seminar and Resource Fair with over 1,700 attendees. Another large veteran and military focused event is the annual health fair held at the regional Naval Medical Center San Diego. RSVP currently has over 575 veterans serving as volunteers and the expectation is that the number will rise as the definition of veteran is clarified with volunteers. Working with the County Veterans Services office and talking with our veteran volunteers, RSVP has learned that many of the older veterans believe that to be classified as a veteran an individual must have either retired from the military or served during a time of war. The RSVP office is updating our veteran volunteer number by surveying the volunteers with the clarification of veteran status. In the past, volunteers have not been asked to identify themselves as a veteran family member. However, in future volunteer surveys and the RSVP application, the veteran family member question will be added.

The Lesbian, Gay, Bisexual and Transsexual (LGBT) community is active in San Diego Community with the second oldest and third largest community center in the country. A member of the community center sits on the sponsoring agency's AIS Advisory Council. AIS staff and the LGBT Community Center representatives meet six times a year to collaborate on needs of the LGBT community. RSVP volunteer information is distributed at the annual Gay Pride Festival. Since sexual orientation is a private issue, it is unknown how many RSVP volunteers are members of this specific community.

Some volunteers come into the San Diego County RSVP with noticeable disabilities, but many of the RSVP volunteers eventually age into some type of disability. Some of the most common volunteer age-related disabilities involve impairments in hearing, eyesight and mobility. The RSVP volunteer stations are very supportive of their volunteers who experience disability. If adjustment is needed to accommodate a disability, the station will find a job that ensures the safety of the volunteer and others, while still engaging the volunteer in meaningful service. The RSVP project office is available for re-assignment assistance to volunteers who may no longer be able to continue with their current volunteer activity. The RSVP project literature and application form has been given to an organization that assists disabled individuals in finding volunteer activities. The San Diego County

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RSVP project has not had to turn anyone away from volunteering due to a disability. Since not all forms of disabilities are obvious or easily recognizable, it is not possible to calculate how many disabled volunteers are serving.

Volunteer retention is a key factor in a healthy and robust volunteer program. The first step to retention starts with the correct placement of a volunteer. The initial placement is done personally by the Assistant RSVP Manager who takes into consideration not only interests and skills but also geographical location and any known personality traits of the volunteer. Interests, skills and geographical preference are covered in questions on the RSVP application. Personality traits may be determined by personal interaction during the placement process. The goal of the process is to give the potential volunteer two or three choices of volunteer stations and activities, if possible. The large number of volunteer stations and activities of RSVP San Diego County is an advantage in providing the volunteer options, not only at the initial placement, but in retaining volunteers if a re-assignment should be desirable or should a volunteer want to serve in more than one category. In order to retain volunteers, their satisfaction level is of great importance. RSVP San Diego conducts an annual survey which asks questions about the satisfaction in volunteer station placement and activity placement with a reminder that they can contact the RSVP office for assistance in re-assignment. The volunteer may become bored with the activity that they have done over time and providing an easy process to a new activity could prevent the volunteer from simply quitting. RSVP San Diego County has been extremely successful in achieving a high satisfaction level among volunteers. In the 2013 volunteer survey, 98.9% of volunteers who responded reported they were very satisfied or satisfied with their current volunteer assignment.

Recognition is important to some volunteers and a factor in their retention. Recognition may be unimportant to others as their motivation comes from other factors; nevertheless, recognition is part of a strong volunteer management program. RSVP San Diego believes in recognizing volunteers as often as possible and utilizing many ways to achieve that recognition. Recognition also serves another important purpose by raising awareness of the volunteer accomplishments and service in the community to the larger audience outside the RSVP arena. Many community members aren't aware of the services that RSVP provides and the number of hours invested in the service activity by volunteers.

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RSVP San Diego conducts Volunteer of the Month recognitions. An article along with a picture about the honored volunteer's service activities and their volunteer station is published in the Aging & Independence Services monthly newsletter, which reaches thousands of San Diego County residents and professionals. The RSVP manager and assistant manager attend a meeting at the honoree's volunteer station to present the certificate of award and to recognize the volunteer in front of their peers and station management. Before the individual award is presented, all the station volunteers are commended for their service to their community.

A large RSVP Recognition Brunch Event is held once a year for 450 to 500 volunteers. This event is free and by invitation only for volunteers who have served at least 100 hours during the previous year. The hundred hour benchmark is new and was chosen based on the health benefits identified by Corporation for Community and National Service (CNCS) in The Health Benefits of Volunteering Issue Brief of published research. In the research, 100 volunteer hours was the threshold for volunteers to reap measureable health benefits. RSVP is working to encourage our volunteers to receive the maximum health benefits gained through volunteering. The volunteer station management has the option of attending to honor their volunteers. A third or more of the eligible volunteers typically attend. At the event, the 25 volunteers with the highest number of hours served during the year are individually recognized as are two in "Volunteer of the Year" categories. There are an abundance of raffle prizes given out and exhibit tables for the attendees to visit. The tables provide blood pressure monitoring, information on services for seniors, resource information for the volunteers or friends and families, and books written by a local celebrity. The volunteers are congratulated and recognized by officials within the County. The Director of Aging & Independence Services honors and congratulates volunteers at the event. At the 2013 Recognition Event, Chairman of the County Board of Supervisors, the governing body for San Diego County, attended and congratulated the RSVP volunteers. Finally, the event honors a community member from one of the volunteer stations, who has been an outstanding ambassador for volunteerism.

The RSVP project website, under development, will also spotlight and recognize volunteers and stations for their service and activities. Volunteer stations will also submit noteworthy volunteer recognitions that will be posted. The website will provide an even wider venue for volunteer recognition.

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Our RSVP project also has the opportunity once a year to nominate a Volunteer of the Month for the Board of Supervisors. The volunteer is recognized and presented with a certificate during a presentation at a Board of Supervisor's meeting and recognized on San Diego County's website. In addition to the Supervisor's Volunteer of the Month, the Board recognizes an RSVP Volunteer of the Year, who also receives recognition and certificate presentation at a Board meeting and on San Diego County's website. The County of San Diego appreciates and values volunteers. Recognition outside the RSVP community is important to volunteers and elevates the level of the recognition.

### **Program Management**

The San Diego County RSVP is managed by experienced staff with established processes and procedures in place developed throughout the RSVP program management since 1996. There are policies in place regarding RSVP regulations and prohibitions. Communication to the volunteer stations regarding program regulations and prohibitions is conducted using the Memorandum of Agreement (MOA), the Volunteer Station Requirements document and RSVP meetings. Volunteers are apprised of prohibited activities in the Volunteer Handbook to ensure there are no misunderstandings. Staff also visits volunteer stations to assess the activities taking place. There are monitoring processes in place to ensure that volunteers are performing their assigned service activities. The reports submitted by volunteer stations provide specific counts related to the assigned service activity. Any questions or issues that arise are resolved with the volunteer or volunteer station management. Station job descriptions are periodically reviewed with RSVP volunteer station administrators or supervisors and visits are made to the volunteer stations. During visits to the volunteer stations, oversight is done by conversation with individual volunteers in addition to the leadership team.

When community needs change, the structure of current identified needs and volunteer stations are evaluated. Realignment of current volunteer stations and volunteers are effected when possible and new community partners are approached. The plan for graduating stations and volunteers started as soon as the new program requirements were published. The goal of San Diego County RSVP was to graduate as few stations and volunteers as possible and in a gradual fashion to avoid program and volunteer disruption. Stations which did not fit into the new program Focus Areas requirements were evaluated for inclusion in the Community Priorities. If the station mission did not align with the spirit of community impact as the MOAs came up for renewal, they were not renewed and the volunteers were offered placement at other RSVP stations. Only three organizations that had active volunteers

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have gone onto inactive status and most of the volunteers have chosen to remain at the volunteer site as non-RSVP volunteers. Some of these volunteers were also volunteering at another RSVP volunteer station, so they were not lost as RSVP volunteers. Fortunately, the size of the San Diego County RSVP allows for a significant number of Community Priority volunteers, which has allowed stations that would have been graduated to remain RSVP volunteer stations. Some stations that would have been graduated have strategically been chosen to participate in a new focus area for San Diego RSVP, which is Disaster Preparedness.

Aging & Independence Services has sponsored the RSVP grant since 1996, with "Aging in Place" activities as an organizational focus. Since the earliest years of grant management, there have been a large number of volunteers engaged in assisting older adults and disabled and homebound individuals to stay in their own homes for as long as possible. This activity has fallen in different defined focus areas through grant requirement transitions, but the activity goal has remained the same. RSVP San Diego County currently manages over 800 volunteers at 31 volunteer stations who provide companionship to older adults, homebound and disabled. In the recent volunteer survey, 98.8% of these volunteers responded that they were satisfied or very satisfied with their current assignment. This is a testament to the ability of the AIS RSVP project to manage volunteers in the Healthy Futures Focus Area.

The RSVP Advisory Council is an integral part of San Diego County RSVP and ensures community participation in the RSVP project. Meetings are held monthly with the RSVP staff in attendance to provide updates and program information. The Council members represent a cross-section of the community, including retired and professional members who have experience or interest in the social needs of the community. The Council represents four races and ethnicities reflecting the diversity in San Diego County. The Council members conduct fund raising activities to support the annual volunteer recognition event and many participate in volunteer activities in addition to their Council duties.

RSVP volunteers are only placed in stations with active Memorandums of Agreements (MOAs). Station MOA status is monitored via reports generated by the volunteer data base software and reviewed by the RSVP Manager. Station MOA renewals are completed every three years. New RSVP volunteers are screened first by phone contact to ensure they meet the minimum RSVP requirements, including age and a second screening occurs after the RSVP application is completed. The volunteer application is reviewed for an appropriate birth date and address, verifying they reside within San

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Diego County.

### **Organizational Capability**

As a sponsor of RSVP, the County of San Diego's Aging & Independence Services (AIS) is well suited to provide sound programmatic and fiscal oversight to the RSVP program. As a federally recognized Area Agency on Aging with a multi-million dollar operational budget, AIS has the appropriate organizational structure and staffing to ensure accountability and efficient use of resources. RSVP supporting staff includes a fiscal department with staff dedicated to monitoring the use of financial resources. Fiscal department staff ensures accountability and compliance with regards to expenditures and of products and services in support of all agency programs, including RSVP. The fiscal staff is well-versed with national, state, and local statutes and regulations. RSVP staff members have a close working relationship with the fiscal department to ensure that all fiscal components of the RSVP program are being managed appropriately, efficiently, and with transparency. In addition to the infrastructure provided by a fiscal department dedicated to AIS, the larger Health & Human Services Agency (HHSA), of which AIS is a division, has a separate, specialized office of budget and contracting to ensure that resources are managed effectively and appropriately. In addition to Fiscal management, the AIS management structure provides programmatic and operational support and oversight to the RSVP project. The project manager reports to the Community Unit manager. They meet regularly in order to review RSVP processes and operational issues. As previously mentioned the entire Community Unit (three other community program managers and staff) supports RSVP recruitment and assists at special RSVP events.

Furthermore, AIS develops a two-year Operation Plan that is submitted to the County Board of Supervisors annually. The Plan outlines budget priorities (including the additional money that our agency contributes to support the RSVP program, salaries, and supplies), as well as staffing and performance targets for the upcoming fiscal year. AIS follows established Board policies related to purchasing and contracting; and services are put out for competitive procurement, as needed. AIS budget planning is reviewed by HHSA Fiscal staff to ensure accuracy in projections.

The County of San Diego utilizes comprehensive competitive hiring processes to ensure a qualified and talented workforce. All staff positions have predefined essential functions, knowledge areas, skills, and desirable traits. There are also minimum necessary requirements in terms of educational background and years of experience in the field of aging. The classifications used for RSVP-staffed positions include Aging Program Specialist III (APS-III) and Aging Program Specialist II (APS-II). The essential functions required of employees within the APS-III and APS-II classifications align well with the skill

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sets required to effectively ensure the accomplishment of RSVP program objectives. APS-III employees are expected to be able to assist in the management of complex grants and funding initiatives, monitor the activities of an entire program or unit, identify needs, and develop effective working relationships with the community, among many other tasks. They are expected to have knowledge of budgeting methods, principles of supervision, and regulations that govern the grants or departments under which they work. APS-II staff members are held to many of the same standards, although their focus is not on managerial and oversight functions. Instead, APS-II employees interact more closely with clients, or in the case of RSVP, volunteers and volunteer stations, and the general public. They are expected to establish and maintain linkages between groups that provide services to older adults. This function is regularly demonstrated by the RSVP Assistant Director who works to nurture relationships with new and existing RSVP sites and to provide a positive and empowering experience for RSVP volunteers throughout all stages of recruitment, placement, and ongoing service. The current RSVP Manager, Linda Hopkins (APS-III), has been in her current role for a year and has over ten years of experience in social services for seniors, twelve years management and supervisory experience, and seven years experience in program development for seniors. In the ten-year period during which she worked with seniors, all programs involved some level of interaction with and management of volunteers. The Assistant Manager, My Linh Tran (APS-II), has been on staff for 6 years and has twenty-two years of social work experience. Through this experience she has gained extensive knowledge and expertise in older adult needs, challenges and the resources that are available. She has outstanding interpersonal skills and gives exceptional customer service to our volunteers and agency liaisons. She assists with volunteer recruitment and many aspects of volunteer recognition. She is proficient with the RSVP database and other computer applications. The RSVP staff is well-equipped with the skills and experience to lead the program to the fulfillment of the objectives. Top management at AIS, including the Director, Assistant Deputy Director, and Manager of Community Programs, all provide strong support for RSVP. The management continuously promotes the program to community groups and encourages new partnerships, particularly in the areas of services for older adult and those with disabilities and intergenerational opportunities. In addition, AIS management has helped to develop collaborations to meet the strategic initiatives within the RSVP focus areas in order to achieve maximum community impact. Top management support has resulted in a significant investment of agency resources to further strengthen the RSVP program. As a part of the County of San Diego, RSVP has had access to the County's risk assessment department and purchasing and contracts department for any questions or needs that may arise in the course of grant

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activities. Personnel issues are managed through the Human Resources Department by the AIS full-time Department Personnel Officer.

Sponsorship by AIS offers to our RSVP project a variety of facilities, equipment, and supplies. AIS provides adequate office and storage space for our staff and client/station records. The County's Department of General Services provides the maintenance to County building sites and equipment such as vehicles. Supplies for day-to-day operations of RSVP are procured as part of regular supply orders through County approved vendors, as needed.

Technology resources and maintenance are provided to all County departments. AIS staff recently received computer upgrades with Windows 7 and will soon be receiving Internet Explorer and Microsoft Office upgrades. Specialized technology support ensures that the RSVP project has the most up-to-date and safe Internet access and that computer programs and files are properly secured. The project budget supports annual upgrades of the volunteer data base software.

The County of San Diego uses Oracle as a financial management system. County policies control expenditures of funds and require careful reporting and budget review. Fiscal department staff provides financial management support to RSVP, including assistance in the preparation of the required CNCS financial reports. RSVP staff and volunteers are reimbursed for mileage through the county system; claims forms are routed through the Fiscal Department and paid by the County Auditor.

Aging & Independence Services has extensive experience effectively managing grants at both the federal and state levels to achieve positive impacts in the field of aging. Aging & Independence Services has successfully managed San Diego County RSVP since 1996. Our project is funded for 1,120 volunteers and we have consistently maintained a senior volunteer corps well in excess of this number. Other current federal grants being managed include a CNCS Legacy Corps grant from the University of Maryland.

San Diego County RSVP has a proven history over multiple grant cycles in developing budgets that are both cost-effective and adequate for the project. As in past grants, the current budget provides funding for volunteer transportation and insurance with no meal reimbursement at this time. Mileage claims are accepted from individuals reporting hardship that places their ability to volunteer at risk without reimbursement. Claims are limited to 150 miles per month reimbursed at the standard County of San Diego IRS rate or bus pass reimbursement. Claims are individually reviewed by the RSVP assistant manager for accuracy, routed through the fiscal department, and paid by the County Auditor. Volunteers are informed that the mileage reimbursement is dependent on availability of

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funds.

The sponsoring agency, AIS, and the RSVP Advisory Council are aware of how important it is to recognize volunteers and have funded a significant investment for the annual Brunch Recognition event. The Advisory Council augments the budget by fundraising for the event. The budget reflects the investment and support of both groups in this important recognition activity. Recruitment is an expected function performed by RSVP staff; however the entire AIS Community Unit (RSVP is a program within this unit) support RSVP recruitment and awareness at events and presentations throughout the county. Two of the unit's team members are dedicated to community outreach and travel with RSVP information which they display and discuss across the county. All of this support increases the RSVP staff impact and ability to reach potential volunteers.

The non-federal funding provided by Aging & Independence Services significantly exceeds the required 30% program match and is close to a 60% program match. This generous level of project support has continued through multiple grant cycles. AIS has provided RSVP project funding since 1996 and will continue to support RSVP at this level going forward through the coming grant cycle.

### **Other**

N/A

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

N/A