

# Narratives

## Executive Summary

United Way of Thurston County, on behalf of the Retired and Senior Volunteer Program (RSVP) of Lewis, Mason and Thurston Counties, seeks 3-years of funding support from the Corporation for National and Community Service. As the sponsor for the past two and a half years, we have successfully and enthusiastically integrated RSVP into the mission of our work; to strengthen our community by mobilizing people and resources to meet identified human needs. The project work plans are anchored by a collaboration of United Ways in Lewis, Mason and Thurston Counties, where there is a long history of working together.

United Way works toward increasing an individuals' access to quality education, sustainable income and good health, the basic building blocks of a good life. By creating opportunities for a better life for all, we advance the common good. Our work, responding to community needs, is dual: prevention and intervention. Our volunteer and funding resources seek to prevent individuals from becoming "at risk", and intervene when individuals' lives become unstable and need public support.

A planned 375 RSVP volunteers will serve on behalf of the RSVP of Lewis, Mason and Thurston Counties. Some of their activities will include preschool classroom assistance, reading assistance with grade school students and mentorship with youth in afterschool programs, as well as repairing homes, building homes and assisting with housing search. The primary focus area of this project is Healthy Futures, which will include activities with food collection, delivery and distribution; medical and general senior transportation and meal delivery; and distribution and training of healthy living and insurance information. At the end of the three-year grant, we expect to see 12,000 individuals receiving emergency, healthy food, 110 unduplicated seniors and persons with disabilities living healthy lives at home, and 620 individuals reporting access to health insurance and health resources. The CNCS Federal investment of \$78,267 will be supplemented by \$33,581 through various supporters including community donors, WA State Department of Commerce and Area Agency on Aging of Lewis Mason and Thurston Counties.

## Strengthening Communities

Describe the community and demonstrate that the community need identified in Healthy Futures exist in the geographic region.

The communities that RSVP serve cover approximately 4,084 square miles in the western central

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portion of Washington State. This rapidly changing area has a unique geographic and demographic mixture of urban, suburban and rural communities and is home to a combined population of 394,785; per the most recent US Census data. The area is comprised of 25 US Census-recognized communities and two Native American Indian reservations.

United Way of Thurston County (UWTC) RSVP is centrally located in Olympia which hosts the state capital and serves the more urban cities of Olympia, Lacey and Tumwater, along with 5 rural communities. Thurston County is sixth among the 39 Washington State counties ranked by population size. According to the US 2010 Census, Thurston County is the largest of the three counties with a population of 258,332, where seniors continue to be one of the fastest growing segments of the population. Mason County's population is 60,832. The United Way of Mason County is located in Shelton, a city of about 9,834, which serves as the County Seat. In Lewis County, United Way is based in the town of Centralia, with a population of 16,336. All three counties include numerous small towns or communities on the periphery of the service area. These communities have significantly lower median incomes and fewer services available, thus making volunteerism a key component of our work to assist in creating stable communities. Of the three counties combined, 13% of the residents live below the poverty level, and 17% are seniors over the age of 65.

RSVP is addressing local needs by placing volunteers in the CNCS Focus Area of Healthy Futures. United Way believes that by investing its volunteer resources most heavily in creating healthy lives for low-income individuals, seniors and those with disabilities, it will assist in making a better place for all. The issues we have identified have four directions of volunteer investment: 1) Aging in Place - To ensure that low-income seniors have a stable environment which will allow them to age in their homes for as long as possible, 2) Access to Food and Reducing Obesity - To ensure that low-income individuals and families have access to healthy food in order to function at their highest potential and reduce the rate of obesity, 3) Access to Care - To ensure that low income individuals have access to prescription medicine at an affordable rate, and 4) Access to Care - To assist in educating low-income individuals on issues of healthy-living choices and avoiding chronic diseases and injuries.

Aging in place: As noted, 17% of the population is over 65 in the region that RSVP serves. This percentage is projected to increase to 21% by 2020. The need for homebound seniors and people with disabilities to age in-place in Lewis, Mason and Thurston Counties is great. Access to adequate and

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reliable transportation for seniors and people with disabilities is a substantial barrier to one's ability to age in their home. According to the WA State Department of Health, in Thurston County 1 in 4 adults, 75 and older, reported poor health (Health of WA State, BRFFS 2012). Access to healthy and prepared food is another key component for a senior or disabled person to remain in their home while aging. According to the Meals-On-Wheels Association, 1 in 7 seniors do not receive adequate food or nutrition. In 2011, nearly 65% of food-insecure seniors were Baby Boomers, aged 60 to 69.

Healthy food and access to emergency food: Compared to children from families who are food-secure, children from families with food-insecurity are more likely to have behavior problems, do poorly in school, need medical care and hospitalization, and develop chronic diseases (Center on Hunger and Poverty, Hampton 2007). As the economic climate worsens, food-insecurity in our area increases. In Lewis County, 57% of families with school-aged children participate in the Free and Reduced School Lunch Program. In Mason County, 58% of families participate, and in Thurston County, 37% participate ([www.k12.wa.us/ChildNutrition/Reports/FreeReducedMeals](http://www.k12.wa.us/ChildNutrition/Reports/FreeReducedMeals)). In the three-county area, 89,280 people access the DSHS Supplement Food Nutrition Program (SNAP), up from 75,762 in 2012 ([www.clientdata.rda.dshs.wa.gov/](http://www.clientdata.rda.dshs.wa.gov/)). Our goal is to reduce hunger and food-insecurity, and increase good nutrition.

Good nutrition is important for staying healthy and preventing illness. Brain cells rely on adequate nutrition in order to send and receive messages in the body. Poor nutrition can cause brain cells to decline in health and function, which can cause negative mental-health impacts like memory loss, confusion, irritability, nervousness and an inability to concentrate, as John D. Kirschmann reports in his book, Nutrition Almanac, Sixth Edition ([www.livestrong.com/article/402350-signs-symptoms-of-poor-nutrition](http://www.livestrong.com/article/402350-signs-symptoms-of-poor-nutrition)). 77% of individuals in the three-county region report that they do not eat enough fruits and vegetables (Thurston County Public Health Department, BRFFS 2011).

Access to care: Although the Affordable Care Act (ACA) Prescription benefits will take effect this October 1st for individuals seeking coverage outside of their place of work, prescription discounts are still needed. Under the Essential Health Benefits portion of the ACA, prescription costs will vary depending on the insurance plans available within the state-run exchange. Some classes of medications will be limited within Medicaid, and some plan deductibles will still put medications out of reach for low-income individuals. An average of 20% of residents in Mason, Lewis and Thurston Counties do not have health insurance (<http://www.countyhealthrankings.org>). This is consistent with the national average where one out every five people do not have prescription drug coverage.

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FamilyWize is a free coupon for anyone who seeks discounts on their medical prescriptions. This card will still be needed even after the Affordable Care Act is in force. RSVP volunteers will be charged with distributing the prescription discount cards across the three-county region.

Access to Care: In the region that RSVP serves, over one fourth of adults have high blood pressure, 1 in 9 adults has asthma, 1 in 14 adults has diabetes, and 1 in 20 adults has had a heart attack, coronary heart disease, angina, or stroke. Further, three fourths of adults do not eat enough fruits and vegetables, and a third of adults do not get enough physical activity, according to the Washington State Department of Health (<http://www.doh.wa.gov/portals>). We partner with the Physicians of Southwest Washington in conducting Healthy Communities trainings and exercises to manage or prevent chronic diseases and conditions in the three-county region.

Describe how the service activities in Healthy Futures leads to national performance measure outputs or outcomes.

Aging in place: As we promote the ability for seniors and the disabled to age in their homes, by investing volunteers in transportation services and meal delivery services, the benefit is two-fold: 1) increased social ties, thereby decreasing the likelihood of depression and depression-related illness, and 2) increased health maintenance, through access to nutritious meals and to doctor appointments, when necessary.

Loneliness-related depression is one of the most common of treatable mental conditions, but among the elderly, it is also one of the most overlooked or ignored. Since depression is an emotional state with a physical component triggered by brain chemistry, it can be helped by engaging social support. According to the Behavioral Risk Factor Surveillance Survey (Thurston County Public Health & Social Services Department) more than 20% of Thurston County adults age 55 and up are in poor, or fair, health. With much needed transportation for access to doctors and pharmacies, deliveries of nutritious food, and visits by a friendly volunteer, the likelihood of aging in their homes is increased.

Healthy food and access to emergency food: Obesity is common, serious, and costly. Currently in the United States, 31% of adults and 18% of children are obese. 31% of the adults are obese in Mason County, 29% in Thurston and 35% in Lewis

([www.countyhealthrankings.org/app/#/washington/2013](http://www.countyhealthrankings.org/app/#/washington/2013)). Obesity is a factor contributing to several leading causes of death, including heart disease, stroke, diabetes, and some types of cancer. Immediate and long term consequences of obesity include physical, psychological and economic

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issues. Persons who are obese incur \$1,429 more in medical expenses than normal weight individuals ([www.healthaffairs.org](http://www.healthaffairs.org)). Nationwide, 29% of men who live at or below poverty level are obese, whereas 42% of women below the poverty level are obese. For children, the prevalence toward obesity increases as socioeconomic levels decrease. United Way's "Healthy Food Initiative" will recruit, train and support volunteers on behalf of food banks, to ask the public for specific healthy food items (fruits and vegetables) while shoppers are visiting grocery stores. The initiative will also empower food bank volunteers to partner with community gardens, restaurants and residential garden gleaning. We believe that children, families and seniors should not be hungry and should have access to nutritious food. We believe this volunteer and community effort will reduce obesity through collecting and distributing fruits and vegetables to low-income families.

Access to care: The FamilyWize prescription distribution and education program will be run completely by volunteers in all three counties. The three United Ways will supervise and train the volunteers. The volunteers will develop their own outreach and education plan. By ensuring that individuals without quality prescription drug coverage will receive a discount on their prescriptions, the likelihood will increase that individuals will become or remain healthier.

Access to Care: Volunteers will assist in educating low-income individuals on issues of healthy-living choices and tips on avoiding chronic diseases and injuries. The classes developed and managed by Physicians of Southwest Washington are derived from the book, *Living a Healthy Life with Chronic Conditions: Self-Management of Heart Disease, Arthritis, Diabetes, Asthma, Bronchitis, Emphysema and Others*, Third Edition.

United Way's plan and infrastructure to support data collection and ensure National Performance Measure outcomes and outputs are measured, collected and managed

Currently our web site displays a data-entry form where volunteers and service providers can easily and efficiently report their volunteer hours on a monthly basis. Volunteer hour forms and impact "client served" forms are available for download on our web site, and staff can easily mail or deliver hard copies. We remind service providers each month to submit hours and "client served" forms. In the case of Reading Buddies mentors and tutors, we captured the beginning and ending reading level of each child. At the end of the year we input the reading scores into a spreadsheet to determine numbers and percentages of impact. In the case of the food bank impact tracking, we surveyed food bank participants to garner data around the change in food-security and nutrition. The survey was distributed through the food bank volunteers. In order for this next grant cycle's output and outcome

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measurement to be successful, we have plans for a volunteer position serving here at RSVP to remind the stations to report volunteer hours and their particular output or outcome every month. Staff will be meeting with all station managers, to inform them of the new output measures and provide them with electronic and hard-copy means of reporting. Staff is knowledgeable and proficient in the use of the data-tracking software program, Volunteer Reporter, and we regularly use Microsoft Excel to tally numbers and identify percentages of those reporting.

Describe any activity in service to veterans or military families as part of service in the Healthy Futures of other focus area or capacity building.

Joint Base Lewis-McCord is 19 miles from Olympia. Olympia and the surrounding area is host to hundreds of military members and their families. All RSVP projects serve military families and veterans throughout the three counties. Projects such as, food banks, Meals on Wheels and medical transportation all serve veterans in all three counties. The children in struggling military families are being served through the Reading Buddy program, Preschools and Afterschool programs. We also serve Veterans by way of engaging them as volunteers. Per our summer 2013 survey, 16.8 % of the active RSVP volunteers are veterans continuing to serve their country through RSVP volunteer projects. Likewise, the US Census Bureau reports that veterans are 16.2% of the overall population in the three county area.

### **Recruitment and Development**

United Way's plan to create high quality volunteer assignments with opportunities to share their experiences, abilities and skills to improve the communities and themselves through service in their communities.

United Way has developed and managed relationships with all of its current volunteer stations and subsequently crafted volunteer assignments that address specified community needs. The formulations of the volunteer positions are based on the specific organization, while ensuring that they match and address the interests and passions of the volunteers.

United Way has a long history of maintaining open lines of communication with our funded community partners, where MOUs (Memorandum of Understanding) are where their results anchored in our core business of grant-making funds where we are completely dependent on the

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service provider to accomplish our mission. The same is true to ensure a well-functioning RSVP program. United Way hosts regular service provider (station) meetings in all three counties where RSVP is present. This allows for ongoing communication between United Way/RSVP staff and the service provider representatives. In addition, RSVP staff sends a monthly email newsletter to stations with program updates, a reminder to send hours and outcomes, a calendar of events, a volunteer spotlight and a service activity spotlight. This has allowed for communication to be ongoing and consistent among all the stations in each county.

The volunteer intake process, which we employ, offers an opportunity for the volunteer to share their life and work experiences in order for staff to assess the skills and interests of the volunteer. Staff members assist the volunteer in pursuing an opportunity to build new skills and abilities, while maximizing on their core natural and learned abilities. We understand that passion toward solving community problems and a chance to make a difference in the issues that matter most to the individual, ultimately improve the community and the life of the volunteer. We are confident in our strong partnerships with stations, clear position descriptions and regular volunteer communications, which ensure high quality volunteer assignments.

United Way's plan and infrastructure to ensure volunteers receive training needed to be highly effective to address identified community needs in the Primary focus are and other focus areas.

Beginning with the volunteer intake process, RSVP volunteers are informed of basic volunteer expectations named in the agency MOU, such as "RSVP volunteers will be punctual, professional and cooperative". Along with this, RSVP staff explains the importance of these behaviors and that volunteering has components similar to that of employment. These components, along with member responsibilities, are highlighted in the RSVP Member Handbook which all volunteers have received. For stations, part of the requirement to host RSVP volunteers is that they have quality and engaging training, both about the station and the specific tasks. Also, new this year, is a one-page handout given at the time of placement, on "how to be a good volunteer", which describes important points such as the value of being dependable, open-minded and respectful.

In the case of our Education Focus Area, which employs our second largest amount of volunteers, we host a monthly "Reading Buddy and mentor" orientation. This has been a highly-successful and

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effective way for volunteers to understand the commitment of working with children and youth, the importance of reading at grade level by third grade, and understanding the required skill set to be a Reading Buddy/mentor.

United Way distributes a monthly RSVP-specific newsletter to all RSVP volunteers and stations, which includes a training tip, MOU reminder, a volunteer profile of the month, and information about upcoming events. This serves as an ongoing and engaging way to keep volunteers trained and oriented, and for them to see their volunteer service as closely affiliated with the mission of RSVP and United Way.

Since the Primary Focus Area is healthy futures, we are planning a new component of training and development for the volunteers serving at food banks. To assist with the "Healthy Food Project" initiative, United Way is fortunate to have been awarded a VISTA volunteer, who will establish and empower volunteers. The project goal is to supply food banks and food backpack programs for youth with healthier foods by employing numerous volunteers in a two-part gleaning activity: community/residential gardens and grocery stores. As part of the orientation, each volunteer will view the movie *A Place at the Table* and participate in a discussion on the effects of hunger on individuals. The grocery store volunteers will have an additional training on "meeting and informing the public" about healthy food. We believe this component to be critical to the success of this project. Many food bank workers have limited knowledge of the real "emergency" facing our country regarding high-fat, high-carb and high-sugar foods, many of which are distributed at food banks. This orientation will serve as motivational fuel for the volunteers, as well as tool them with appropriate talking points in the community.

According to the summer 2012 RSVP Volunteer Survey, all participants that responded indicated that they felt well supported and guided when seeking their RSVP placement.

The demographics of the community served and plans to recruit a volunteer pool reflective of the community served

\* diverse races, ethnicities, sexual orientations, degrees of English language proficiency... veterans and military families as RSVP members

\* RSVP volunteers with disabilities

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United Way will continue to enhance all activities to recruit RSVP volunteers. We know that word-of-mouth is crucial to volunteer recruitment. In the RSVP 2013 Summer Survey, 98% of the active volunteers would recommend volunteering with the RSVP to a friend or family member. United Way will utilize the marketing materials created for RSVP. We will use all our existing outreach tools for RSVP volunteer recruitment, including our website, Facebook pages and newsletters. RSVP staff will submit press releases, volunteer spotlights and articles to The Olympian, The Chronicle, Mason County Journal, North Mason Life, Shelton Life and Senior News. We will continue to promote RSVP with speaking engagements at numerous Senior Centers, station volunteer appreciation events, United Way sponsored events and area civic groups.

RSVP is eager to support and engage volunteers of all backgrounds and abilities especially individuals of diverse races, ethnicities, sexual orientation, degrees of English language proficiency and who possess disabilities. We believe the recruitment process is two-fold: 1) engage our service providers (stations) who have varying degrees of minority engagement, but some none-the-less, and 2) populate our RSVP advisory committees (and other United Way committees and boards) who represent minority populations. United Way/RSVP staff will prepare a session for each of the regular United Way sponsored meetings with service providers to address this issue, with the goal of understanding and engaging a diverse client base, but ultimately to match with diverse types of volunteers. We always and will continue to seek diversity on the numerous committees and board of the three United Ways in each county, so as to represent the community we serve. We know that 11% of the population in the three counties identify themselves as non-Caucasian. By raising awareness of the engagement and understanding of those from diverse races, ethnicities, sexual orientation, degrees of English language proficiency and who possess disabilities, we intend to boost our RSVP volunteer base to represent the named diversities.

United Way's plan and infrastructure to retain and recognize the RSVP volunteers

We recognize that there are three factors that motivate people to volunteer: authority, achievement and affiliation. Volunteers may want to be in charge of a project; they may want to learn new skills and have a sense of achievement; or they may want to feel that they are involved in their community. This understanding is key to our retention and recognition process

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United Way works to ensure that RSVP volunteers are retained and recognized each step of the way. We provide mileage reimbursement at \$.45/mile to ensure volunteers have the resources they need to continue their valued service. We hold three volunteer recognition events each year in each county. Volunteers receive a birthday card signed by RSVP staff thanking them for their dedication and service. Finally, volunteers receive an annual survey and a monthly newsletter highlighting various volunteers and station activities, each of which builds identity as an RSVP member.

The station MOU, signed by all providers, names the requirement that they are to employ a recognition program of their own. We know and have verified that this occurs with many wonderful examples. The topic at the March 2012 Thurston County service provider meeting, hosted by United Way, dealt with numerous types of recognition practices and the practice of identifying the correct style for volunteers. Examples from some of the RSVP service providers included the following activities: invite a volunteer to a board meeting, feature them in a newsletter, arrange discounts at local businesses, give them the front parking spot or honor them at your agency gala. This practice of peer sharing about recognition practices, among local service providers and RSVP stations, is effective and is a practice that we plan to continue.

In the case of the Reading Buddies for school-age youth, we hosted a Reading Buddy Round-Up in June 2013, where all 50 volunteers were invited to share their experiences and provide feedback for program sustainability, both affirmations and challenges. We see this as a key model in retaining volunteers. When individuals are asked their opinion, and it is respected, they are more likely to retain their investment in the project or service.

### **Program Management**

United Way's plan and infrastructure to ensure management of volunteer stations are in compliance with RSVP program regulations - such as identifying prohibited activities

United Way has a long history of agency relationships that require an MOU, since we serve as a funder. With this in mind, agencies are prepared and willing to cooperate, as it holds mutual benefit currently and in the future.

United Way staff and its volunteers will visit each RSVP station in the coming year. During this site

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visit, position descriptions will be reviewed and reaffirmed, adjusted, or deleted depending upon their alignment with the Performance Measures named in the proposal. The MOU agreement will be reaffirmed with the following highlights: 1) that an orientation program and volunteer position-specific training are in place at each station, and are sufficient to meet the volunteers' need to succeed, 2) interview and criminal background check procedures are present, 3) that materials needed for volunteers to accomplish the assigned tasks are available, 4) a position description is provided to the volunteers, 5) supervision is available and adequate for volunteers, 6) adequate safety measures are observed on behalf of RSVP volunteers, 7) any accidents and/or injuries involving RSVP volunteers are investigated and reported in writing and in a timely manner, 8) volunteer's timesheets and output numbers are signed and submitted on time, and 9) volunteers are not taking the place of previously held staff positions, giving religious instruction, assisting with electoral activities, or accepting money/donations from their service recipients.

In the case of informing the volunteers, each volunteer has received a Volunteer Handbook which specifically lists the prohibited activities and other such issues named above such as reporting an accident or injury. Our monthly newsletter also serves as a regular medium for us to communicate the RSVP program regulations.

United Way's plan and infrastructure to develop and or oversee volunteer stations to ensure that volunteers are performing their assigned service activities.

As noted above, RSVP staff and volunteers will conduct site visits to ensure that the volunteers are performing the tasks included in the position descriptions. In addition, United Way's RSVP staff are very open to assisting with situational support when a volunteer feels they are not being used effectively or have diverted from the original intended position description. The RSVP newsletter will highlight one component of the MOU each month, which will include the requirement that volunteers stay within the RSVP position description. Each month, United Way RSVP staff are able to meet with several of the service providers through the monthly and/or quarterly meetings, where we seek project accountability with the stations. Finally, in the case of Reading Buddies, RSVP volunteers are given name tags to identify themselves while volunteering at the schools. We believe this creates a message of allegiance and clarity between the RSVP volunteer and the school, thus communicating their role.

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United Way's plan and infrastructure to meet changing needs to include minimizing disruption to current volunteers as applicable and/or graduation stations as necessary

We have thoughtfully planned and organized the roll-out of the volunteer and station graduation process in the prior and upcoming months. Each volunteer position underwent the following questions to determine inclusion in the new grant cycle: 1) Does the position align with CNCS performance measures and United Ways' focus of Economic Opportunity, Education or Healthy futures? 2) Does the station have organizational capacity to measure outcomes/outputs? 3) Does the existing RSVP station adhere to the expectations named in the signed MOU? That said, some stations will see an elimination of some positions, but not all. For example, our local children's museum hosted numerous RSVP positions, not allowable in the new grant cycle. However, they host a licensed and certified pre-school for low-income children, where volunteers are appropriately serving within the work plan related to school readiness. Stations will receive letters, and in some cases phone calls, notifying them of this change. All volunteers whose positions are eliminated will be notified, followed by an invitation to invest their time toward the activities named in the work plans.

United Way's track record in the Primary Focus Area, to include, if applicable measuring performance in the Primary Focus area

United Way's track record in Healthy Futures: United Way invests resources by focusing on three issues: Income, Education and Health. Healthy Futures being our RSVP Primary Focus Area is the third tenant in what we describe as the three building blocks for a good life. Since 1954, United Way has invested funds in food banks, food delivery, nutrition education, community gardens, hygiene kits and numerous other projects with the goal of advancing the common good and creating a better life for all.

United Way partners with an organization called FamilyWize, where they supply to us, for distribution, free prescription discount cards. This allows low-income individuals to purchase their prescriptions at a discounted rate, leaving extra funds for them to save and buy other essentials. This also eliminates funding barriers that individuals may experience while acquiring their essential medications. The FamilyWize project is further described in our work plan under Healthy Futures.

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United Way has a long history of securing performance data from service providers (stations) in order to measure project outcomes. As mentioned, we have recently completed two years as the RSVP sponsor. For those years, we have successfully surveyed food bank clients and tracked reading levels of grade school students. We intend to continue tracking grade school reading levels, which will meet the requirement of 10% of our volunteers and is categorized as "Other Focus Area." Additional data collection is undertaken by the RSVP service partners, as agreed upon through the MOU.

United Way conducts annual community assessments, and partners with The Evergreen State College's MPA program to collect data on identified community indicators. We will also conduct volunteer surveys to determine volunteer needs and their satisfaction levels with projects. We have extensive experience assessing community impact through our community investment process, in which we require our grantees to report on their outputs and the resulting community outcomes. A logic model is used for this process, and bi-annual progress reports are required. We invest in training agencies on the creation and use of these reporting tools, and train our community investment volunteers on how to review progress reports.

United Way's plan and infrastructure to ensure the project is in compliance with the RSVP federal regulations to include establishing an RSVP Advisory Council, ensuring RSVP volunteers are placed in stations that have signed the required MOU, and ensuring all volunteers are eligible to serve in RSVP

United Way has an excellent track record of developing and utilizing community volunteers through its Community Investment Committee and Early Learning Initiative, to name a couple. We understand the importance of hearing the perspective of community members at all levels of leadership and influence. Key to a successful committee is member diversity including, but not limited to, age, gender, sexual orientation, ethnic background and faith tradition. Critical to our RSVP project is representation from all three counties, including those living in rural and urban areas. We have begun a process of establishing sub-advisory councils to represent the RSVP activities of Lewis and Mason Counties, which are more rural, as compared to Thurston County.

United Way is privy and practiced at writing, signing and adhering to MOUs as grant makers and community conveners. Partnership with community service providers is the mode by which we

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accomplish much of our mission. As the new RSVP sponsor, we were very diligent in ensuring that each station signed an MOU. The renewal dates for each are recorded in our database system to ensure a timely re-up of the RSVP partnership. On the planned annual site visit, it will again be verified that all parties maintain a signed MOU copy on the premises.

Along the same lines, each volunteer affiliated with RSVP has a signed registration form, including their birthdate (for age verification), their driver's license number and insurance information (for legally driving to volunteer events), and beneficiary information (for insurance claims). Included on the registration form is a section "for office use only", which allows staff to affirm, with a signature, that the volunteer is eligible to serve as an RSVP volunteer.

### **Organizational Capability**

United Way's plan and infrastructure to provide sound programmatic and fiscal oversight (both financial and in-kind) and day-to-day operational support to ensure compliance with RSVP program requirements (statutes, regulations, and applicable OMB Circulars) and ensure accountability and efficient and effective use of available resources.

United Way's plan and infrastructure to provide sound programmatic and fiscal oversight: Financial oversight and support is provided by United Way's Finance Manager Phil Brown. Phil joined United Way of Thurston County as Finance Manager in 2006, and previously served on the United Way Community Investment Committee in Whatcom County. In addition to maintaining all financial records, including accounts payable, accounts receivable, payroll, taxes, and general ledger, Phil manages all cash and investment accounts and prepares the annual operations budget.

United Way manages a \$1.4 million annual development campaign involving corporate and individual donations from thousands of individuals and entities. We distribute grant and designated funds on a quarterly basis to numerous non-profits. The Finance Committee of our 26-member Board provides monthly oversight. We have had consistently excellent annual audits, clear of any financial adjustments or material findings.

United Way receives numerous in-kind gifts throughout the years through its other fund development activities. We have an in-kind gift policy which includes signatures from the donors along with the estimated market value, which is recognized in our finance system. The donor receives a thank you

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letter for the gift, stating that value. The above practice is employed for RSVP in-kind gifts, and records are maintained for the appropriate time. United Way RSVP and Finance staff understand that we are to determine every RSVP expense to meet the criteria of allowable, reasonable, necessary, allocable and documented.

We recognize that RSVP requires substantial time in tracking expenses and volunteer hours. A team of RSVP-supported staff oversees the program mission, administrative duties and fiscal management. The RSVP director supervises the program coordinator and the VISTA volunteer. The director works closely with our finance staff under direction of Phil Brown, Finance Manager. United Way has a strong financial management system with oversight from our Board Finance Committee and Audit Committee. Our Executive Director, Paul Knox, provides program direction and guidance to align the United Way mission and vision to those of RSVP programs, and provides the necessary direction to ensure quality, accountability and results.

United Way has a strong Audit Committee, which is a standing committee separate from the Finance Committee and comprised of Board members. The committee meets to prepare the scope of work for the annual third-party audit performed by a reputable accounting firm. At the completion of the audit, the committee makes a formal presentation to the Board of Directors.

Volunteer Reporter serves as the vehicle for managing key volunteer information. As we end our second year as the RSVP sponsor, we continue to build program sustainability by formalizing policies and procedures related to information management including volunteer registration forms, filing systems and station agreements (MOUs). The RSVP Coordinator records hours, ensures volunteer records are maintained and seeks to place members in a satisfying volunteer position.

United Way staff, responsible for RSVP activities, understands and has access to all OMB circulars related to fiscal and program compliance. The RSVP Advisory Committee members have a role in accountability for providing sound program oversight; they are free to ask questions and recognize the extensive reporting and record keeping required by CNCS. When a question arises relating to compliance, RSVP staff is comfortable reaching out to the CNCS state office for clarification.

Our Community Investment process both involves volunteers and demonstrates our experience with

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impact-based programming. All of our programming is outcome-based as we have identified the most pressing community needs and we strategically direct our time and resources towards those needs. We have replicated similar practices in measuring outputs and outcomes with RSVP supported projects. We possess the collective expertise and internal systems to test and report community impact.

Day to day operational support (facilities, supplies, equipment) support to ensure compliance with RSVP program requirements (statutes, regulations, and applicable OMB Circulars)

United Way of Thurston County has successfully implemented RSVP after only 24 months of operation. We have recruited and matched 565 volunteers, and acquired 71 stations, as well as purchased software, volunteer insurance, hired staff and conducted a number of other start-up related efforts. The RSVP Operations Handbook is prominently on the office bookshelves, and on the desktop of RSVP staff computers where staff can refer to statutes and regulations conveniently as needed.

United Way allows for 2 offices out of the 10 private offices to accommodate RSVP staff. United Way maintains a storage room, copy room and meeting room to allow for proper storage, printing and meetings as needed by the RSVP project. We have systems and procedures in place for purchasing supplies, personnel management, travel guidelines, ethics, grievance policies and other internal policies. The office maintains numerous filing cabinets, capable of being locked, and adheres to a records management and retention policy. We have adequate technology, communication systems and office equipment. We have a strong, engaged Board with Executive, Finance, Audit, Personnel and Development Committees to support the on-going and diverse work of United Way.

We conduct annual organizational self-assessments through a staff planning retreat. All staff complete Individual Development Plans and Work Plans, and review these annually with the Executive Director or their supervisor. The RSVP Director and Coordinator take part in the annual organization self-assessment and complete their own Individual Development and Work Plans. RSVP volunteers are given yearly opportunities to evaluate the program, as are site coordinators, via a choice of web-based or paper surveys. Our organization is very committed to continuous improvement in practices and operations. We pride ourselves on learning and growing together.

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United Way has clearly defined staff positions, identified current staff assigned to the RSVP project

The RSVP Program Director, Jeannie Gruber, began leadership of the RSVP program for the three counties in September 2011 at 30 hours per week. Jeannie has 25 years of non-profit leadership, which includes program design and implementation, budget oversight, staff management, fundraising, board governance, volunteer committee formation and direction, and public speaking. In January 2012, Jennifer Thomson became the RSVP Program Coordinator at 30 hours per week. Jennifer has 30 years of customer service and sales experience, and has recently completed her certification in the Non-Profit Leadership Institute at Puget Sound Community College. Both Jennifer and Jeannie have clearly defined position descriptions and maintain "RSVP" in their position titles. The VISTA volunteer is responsible for developing the "Health Food Project", along with marketing and outreach for the RSVP. The VISTA position includes other volunteer recruitments and promotions, not related to the RSVP, which is clearly described in the Volunteer Assignment Description (VAD).

Oversight and support for these staff is provided by United Way's Executive Director Paul Knox. Paul has served as the Executive Director of United Way of Thurston County since January 2010, and had served as a Board member since 2008. Prior to that, Paul directed asset building activities and related policy and performance initiatives at the Washington State Department of Commerce.

RSVP responsibilities are also held by our Finance Manager, Phil Brown, as described above. He understands his role of assuring that income and expenses for the RSVP are accounted for and reported accurately. Finally, Michelle Rodriguez, the United Way Marketing and Communication Manager, maintains responsibility to prepare selected RSVP marketing materials and messaging consistent with CNCS logos and images. She earned her master's degree in Marketing and Public Relations, and maintains an undergraduate degree in Journalism. Michelle and Phil's job descriptions are clearly defined as such.

United Way demonstrates organization capacity to develop and implement internal policies and operating procedures to provide governance and manage risk, such as accounting, personnel management and purchasing

## Narratives

Organizational policies are approved at the Board level and include issues such as personnel and investment. The 20-page personnel handbook includes policies approved by the Board and discusses numerous topics, which include, but are not limited to, travel policy, allowable holidays, disciplinary action, code of conduct and employee benefit programs. The Fiscal Policy, reviewed annually by the third-party auditor, includes such topics as credit cards, employee reimbursement, cash disbursement, payroll, separation of duties, and bank statement reconciliation. In the case of small purchasing, each staff member has a United Way Credit card and adheres to a credit card policy named in both the fiscal policy and the personnel policy. This policy requires that purchases be approved by a supervisor, are included in the budget, and that a receipt be submitted to the finance manager after purchases.

Operating policies and procedures exist within each department, reflect day-to-day operations and do not require Board approval. Procedures are developed by staff, discussed with the Advisory Committee, and shared and agreed upon by those involved. Procedure manuals are organic and evolving as issues arise or capacity changes. Policies and procedures required by CNCS are maintained as such, and precede or reflect United Way and RSVP Policies and procedures. The RSVP maintains a procedures manual which includes such issues as maintaining station MOUs on file, criminal background checks, volunteer eligibility, volunteer mileage reimbursement and media procedures.

We understand the critical role of operating procedures and organization policies and hold them in high regard, so as to avoid legal or financial pitfalls. An "Officers and Directors" insurance policy is maintained to assist with the improbable chance that a legal or financial issue would arise. We are confident that our risk management tactics are stable and strong.

United Way demonstrates organization capacity to manage capital assets such as facilities, equipment, and supplies.

United Way of Thurston County currently rents the office space where it resides. We maintain electronic equipment, furniture and office/program supplies to serve 10 FTE staff effectively. We possess liability insurance to cover loss or damage of these items in the case of a fire or natural disaster. As the RSVP and agency budgets are developed annually, inventory is taken to identify potential furniture and electronic upgrades. Large capital purchases not specified in the annual board-

## **Narratives**

approved budget require prior approval of the board. An exception would be made in the case of an emergency where time is of the essence, for instance, a total server failure.

Demonstrates organizational infrastructure in the areas of robust financial management capacity and systems and past experience in managing federal grants.

As a grant maker and fundraiser on the community's behalf, it is critical that United Way of Thurston County possess robust financial management capacity. Thus, we have two, full-time dedicated staff who share a combined 50 years of experience working in corporate and nonprofit financial management. As stated earlier, the Finance Committee meets monthly with finance staff to review financial statements. To maintain accountability, the Board Treasurer reviews and signs bank statements and reconciliations of all accounts. The Audit Committee, spate from the Finance Committee, meets prior to the annual audit to prepare the scope of work and at the completion of the Audit to review any issues or questions. The committee finalizes the Audit by presenting the outcomes to the entire board and staff.

Our accounting system runs on the platform of QuickBooks, where each program, including RSVP maintains a separate "class". Each income and expense is posted and tagged RSVP, which allows for FFR (Federal Financial Report), eGrants Financial Report and the PMS (Payment Management System) to be done with ease, clarity and accuracy.

In 2005, United Way of Thurston County was awarded an \$803,000 federal Early Learning Opportunities Act (ELOA) grant which funded four local early learning programs over 24 months. Current United Way staff effectively managed the grant, met all reporting requirements, and supervised the contracted evaluation for the project. In 2011, United Way of Thurston County was awarded a \$5,775 Volunteers In Tax Assistance (VITA) federal grant which supported our vision that low-income individuals become financially stable. United Way met all reporting requirements and allocated the funds according to the federal agreement.

### **Other**

United Way of Thurston County is honored to have this opportunity to work on behalf of the mission and goals of the Corporation for National and Community Service (CNCS). We have successfully demonstrated over the past two and a half years how United Way of Thurston County can adequately

## **Narratives**

support and enhance the work the Retired and Senior Volunteer program. We will enthusiastically welcome a continued invitation to sponsor RSVP for the next 3-year grant cycle.

This budget was prepared for July 2014 - June 2015, with the possibility that wages, taxes and health insurance costs may change. We understand that a budget revision may be required.

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

NA