

# Narratives

## Executive Summary

An estimated 100 RSVP volunteers will serve. Some of their activities will include performing home repair and weatherization, personal financial coaching, income tax preparation, and community gardening. At the end of the three-year grant, 45 community members will receive home repair services and 30 community members will have increased their food security. The CNCS federal investment of \$33,601 will be supplemented by \$9,503 in non-federal resources.

## Strengthening Communities

United Way of Wapello County primarily serves Wapello County, Iowa. Wapello County has a population of 35,366 according to the 2012 census data. United Way's office is located in Ottumwa, the county seat. Ottumwa is a regional center that includes education, health care and retail shopping. In Wapello County, there are an estimated 10,200 residents aged fifty-five years old or older.

Monroe County lies directly west of Wapello County. It has a total population of 7,949 and an estimated 2,574 residents age fifty-five years or older. The county seat is Albia, and the county includes a portion of Eddyville.

United Way of Wapello County (UWWC) operates an internal Volunteer Center with funding from the Volunteer Generation Fund grant. The Volunteer Center also contracts with the Iowa Department of Human Services to recruit and manage volunteers for a nine-county area. The Volunteer Center's service area includes Appanoose, Davis, Jefferson, Keokuk, Mahaska, Monroe, Van Buren, Wapello and Washington Counties.

The primary focus area of this RSVP grant will be economic opportunity. There is a demonstrated need for these types of services in our service area. Southeast Iowa is particularly economically disadvantaged.

The percentage of the population living under the federal poverty line is 17.8% in Wapello County, according to the latest census information. This is significantly higher than the 11.9% living under the poverty line in the state of Iowa, and higher than the 15% of the population of the United States living in poverty. The percentage under the poverty line in Monroe County is lower, at 11.2%.

## **Narratives**

The FDIC found that 17.2% of households in Iowa are under-banked; these households have a bank account but utilize alternative financial institutions for advances, loans, pay bills, and other transactions. The same study found that 4.4% of households in Iowa are unbanked; these households have no checking or savings account. Those who are unbanked and under-banked often incur high fees for cashing checks, buying money orders, and utilizing payday loans, and they often have little or no savings.

According to Feeding America, 14.3% of Wapello County is food insecure. In Monroe County, 11.9% of the population is food insecure. Southern Iowa Economic Development Association processed 1,932 applications for Low Income Home Energy Assistance Program (LIHEAP) in Wapello County from November 1, 2012 to April 20, 2013.

RSVP volunteers will work specifically on financial literacy, free tax preparation and housing services to address these needs in our area.

UWWC will recruit RSVP volunteers to support our weatherization projects. We have implemented small-scale weatherization projects with volunteers who performed services including replacing windows, installing storm doors, and insulating windows with plastic. Southern Iowa Economic Development Association identified homeowners who qualified for LIHEAP assistance but who were not eligible for their weatherization program. These volunteer projects were one-day projects.

With RSVP volunteers, we hope to expand this program to include more low-income homeowners. We will replicate a program successfully implemented in Jefferson County that worked with the Veterans Association to identify veteran homeowners in need of weatherization or home improvement services. Volunteers will help identify homeowners, evaluate the homes, order needed supplies, and perform weatherization activities.

We will track the number of individuals benefiting from these housing services through our application process. The homeowners certify through the application process the number of individuals living in the household, the total household income and veteran status. This information will be entered into our Donation Tracker database for tracking and reporting purposes. We will also track the number of volunteers and volunteer hours dedicated to this program.

## **Narratives**

We plan to work with Iowa State University Extension (ISU) to implement a personal financial coaching program. Financial Coaching is a volunteer program to provide individual guidance for families when they are experiencing financial difficulties or need information to assist them with financial decisions. RSVP volunteers will work with clients to develop household budgets and spending plans, manage their credit, organize personal financial information, and create a savings plan. Volunteers will receive training and support from ISU to develop the skills needed for this program. This program will be implemented in Wapello and Monroe Counties in the fall of 2013.

We will work with ISU to collect data on the number of clients served and the outcomes of this service, including the number of clients who become fully banked, create a savings account, and improve their credit. We will also track the number of volunteers and volunteer hours dedicated to this program.

RSVP volunteers will also work with United Way of Wapello County to implement the Volunteer Income Tax Assistance program. The Volunteer Income Tax Assistance (VITA) program provides free tax preparation to people who make \$51,000 or less annually and need assistance in preparing their tax returns. Volunteers will be IRS-certified to prepare basic income tax returns for qualified individuals in Wapello and Monroe Counties. They will inform taxpayers about special tax credits for which they may qualify, including the Earned Income Tax Credit (EITC), Child Tax Credit, and Credit for the Elderly or the Disabled. These tax credits, particularly the EITC, pull people in Iowa out of poverty every year. UWWC has conducted a VITA site for three years, and we hope to expand this program in future years to include additional sites.

The VITA program is an internal program of United Way of Wapello County. We track the number of clients served, the number of dollars returned to VITA clients, and the number of volunteers and volunteer hours.

We plan to work with the local Veterans Administration, the Iowa National Guard base in Ottumwa, and other local organizations who work with military members and veterans to promote these services specifically to military members and veterans.

## **Narratives**

To accomplish these goals, we will hire a Project Director. The Project Director will be a full time employee of United Way of Wapello County. Funds from this grant will cover sixty percent of the personnel costs of the RSVP program, including fringe benefits and health insurance. The Project Director will work managing the RSVP program with the support of the Volunteer Engagement Director. We will also contract with a local person or organization to be a local point of contact in Monroe County. They will recruit volunteers and volunteer stations, and be available to answer questions or greet potential volunteers locally.

### **Recruitment and Development**

United Way of Wapello County and the Volunteer Center are well equipped to create high quality volunteer assignments. We will work to create volunteer opportunities which have lasting impact on the community, both in our primary focus area and in other community projects.

We will be recruiting volunteers for programs which will capitalize on the experience and skills of those aged fifty-five and over. As personal financial coaches and tax preparers, volunteers will bring both professional skills and years of personal experience in managing household budgets and filing income taxes. In the weatherization project, volunteers will use skills they have gained from years of homeownership and potentially professional construction experience. In United Way of Wapello County's Community Garden project, volunteers will draw on their own gardening experiences to help community members grow their own food.

To ensure volunteers receive the training they need to be effective, the Volunteer Center will evaluate the training processes of each program in which RSVP volunteers serve. The VITA program has a training system developed by the IRS. Iowa State University is currently developing the training series for the Personal Financial Coaching Program which the Volunteer Center will evaluate prior to volunteer placement. The Community Garden and Weatherization projects have less formal training programs. Volunteers will receive an orientation about United Way and the RSVP program, as well as any task-related skills they need from United Way staff. Any additional programs requesting RSVP volunteers will also be evaluated prior to volunteer placement.

To recruit volunteers from a broad range of demographics, United Way of Wapello County will utilize the broad range of connections we have formed in the years we have been working in our community. UWWC and the Volunteer Center have strong partnerships across all sections of our

## Narratives

community: public and educational institutions, nonprofit partners, and businesses in our community. We enjoy a high degree of visibility and support within the community at large. We will capitalize on those strengths to reach potential volunteers from the broadest possible pool of volunteers.

United Way of Wapello County and the Volunteer Center currently work with volunteers from the Promise Center, a support program for patients of Southern Iowa Mental Health Center, and from the elderly and disabled housing unit in Ottumwa. We have been successful in providing accommodations needed for disabled individuals to have meaningful volunteer experiences.

According to the latest census information, 95.6% of Monroe County identified as Caucasian alone, 2.4% identified as Hispanic or Latino, 1.1% as more than one race, and 0.5% as Black or African American. 2.5% of the population speaks a language other than English in the home.

In Wapello County, 86.6% identified as White alone, 9.5% identified as Hispanic or Latino, 1.7% as Black or African American, and 1.3% as two or more races. In Wapello County, 6.1% of the population speak a language other than English in the home.

We reach out to diverse groups through workplace and retiree campaigns, churches, and community groups like the New Iowan Center. We also use volunteer translators when speaking to groups with limited English proficiency.

We will continue to recruit and manage volunteers from a variety of racial and ethnic backgrounds, volunteers with limited English proficiency, and volunteers with disabilities.

United Way of Wapello County and the Volunteer Center have a strong system in place to retain and recognize volunteers.

The New Volunteer Workforce, a study published in the Stanford Social Innovation Review, found that the main reason volunteers leave an organization is poor volunteer management. The Volunteer Center works extensively with area nonprofits to improve volunteer management practices. The Volunteer Engagement Director is a Certified Volunteer Manager. The Volunteer Center partners with

## **Narratives**

Indian Hills Community College to offer the Volunteer Management Certification course, which is a three day program dedicated to volunteer management and retention practices. The Volunteer Center also offers monthly Directors of Volunteers In Agencies (DOVIA) meetings. Each meeting presents on a learning topic relevant to volunteer management.

The Volunteer Center will work with the RSVP Project Director to ensure RSVP volunteers are well managed. This includes matching volunteers' skills with appropriate assignments, providing training and professional development, training staff to work successfully with volunteers, and recognizing volunteers.

United Way of Wapello County and the Volunteer Center recognize volunteers both formally and informally. We formally recognize volunteers during National Volunteer Week. National Volunteer Week activities have included a volunteer reception, thank-you cards and gifts, flowers and balloons. Activities vary from year to year and are informed by individual volunteer preferences. We have also nominated volunteers for the Governor's Volunteer Award.

We regularly thank volunteers with birthday, holiday, and thank-you cards, as well as regular verbal and written recognition of accomplishments.

### **Program Management**

The RSVP program will be managed by the full-time Volunteer Engagement Director and the RSVP Project Director. The Volunteer Engagement Director will oversee the overall program management, and the Project Director will implement specific strategies to ensure compliance with RSVP grant requirements.

The Volunteer Engagement Director is a Certified Volunteer Manager and has experience in program development and management. The Volunteer Center was established in 2011 with funds from the Volunteer Generation Fund. The Volunteer Engagement Director developed the policies, programs and tracking procedures for the Volunteer Center. The program increased the number of volunteers managed by United Way from 45 to 438. We have implemented the Volunteer Management Certification program, which has provided in-depth volunteer management training to twenty area volunteer managers. We also developed a Business Volunteer Network, which has connected 85 volunteers to one-day projects managed by United Way of Wapello County. The Volunteer

## **Narratives**

Engagement Director will work with the Project Director to develop and implement a quality RSVP program.

The RSVP Project Director will work with potential volunteer sites prior to volunteer placement. The Project Director will review RSVP program regulations with the volunteer sites, including prohibited activities. Also prior to placement, the Project Director will obtain a signed MOU.

While RSVP volunteers are placed at a volunteer station, the Project Director will make periodic visits to ensure volunteers are performing their assigned service activities, and to ensure volunteers are not participating in any prohibited activities. The Project Director will also ensure that the site of the volunteer stations are comfortable and accessible for RSVP volunteers providing service there. The frequency and number of visits will vary based on the type of service provided and the duration of the project.

UWWC will also contract with a local person or organization in Monroe County to be a local point of contact for volunteers and volunteer stations.

United Way of Wapello County and the Volunteer Center do have a good track record in the area of economic opportunity. We began a weatherization program last year which utilized volunteers to make repairs and perform weatherization for two low-income homeowners. We have identified two more homeowners for the program this year. Our goal is to recruit additional volunteers and organizations and to expand this program to benefit more people in Wapello and Monroe County. United Way has also run the Volunteer Income Tax Assistance program for three tax seasons. In total, volunteers prepared 95 federal tax returns, 85 state returns, and secured \$130,083.00 in tax returns and credits for low- and moderate-income families in Wapello County.

The Volunteer Engagement Director and the RSVP Project Director will establish a RSVP Advisory Council. The Advisory Council will consist of United Way of Wapello County board members, representatives from organizations with RSVP volunteer stations, and interested community members.

### **Organizational Capability**

United Way of Wapello County (UWWC) is an IRS 501(c)(3) not-for-profit established in 1965 whose

## **Narratives**

mission is to "advance the common good of our communities and make lasting, measurable improvements to education, income and health". Offices are located in the historic downtown district of Ottumwa, Iowa.

United Way is advancing the common good by focusing on the building blocks of a good quality of life -- education, income and health. To that end, the organization has announced ambitious goals: Over the next ten years, UWWC will increase the number of seniors who graduate from high school, increase the number of low-income working families who are financially stable, increase the number of youth and adults who have access to health care, and increase the number of volunteer opportunities and volunteers that make an impact in the communities we serve.

To reach goals of this magnitude requires collaboration across all sectors -- big businesses, small businesses, elected officials, nonprofits, academia, the faith community, the labor movement, the media, parents, seniors and neighbors. By enlisting support across our community, we can accomplish things that no one organization and no individual can accomplish alone.

United Way's job is to recruit individuals and organizations from across Wapello County and Southeast Iowa who bring the passion, expertise and resources needed to get things done. United Way has deep roots in the community with volunteer leadership on the ground, but we also have the broad reach that allows us to roll out good ideas across the state, nation and around the world. This allows United Way to leverage resources in a way that no other organization can.

Volunteerism has always been a strong component of UWWC's philosophy and the board has committed to increase the volunteer capacity of the communities we serve. The President/CEO and the Volunteer Engagement Director are Certified Volunteer Management Specialist and have over 35 years of collective experience in the field. Both individuals provide training and coaching and have presented at local, state and national conferences.

UWWC strategically engages and builds relationships with diverse community stakeholders and partners to identify community goals and concerns, we choose a limited number of critical issues, develop impact strategies that change community conditions, implement those strategies in partnership with others, and we measure and communicate results. United Way is dedicated to

## **Narratives**

improving lives by connecting community members to volunteer opportunities that provide the greatest impact in mobilizing the caring power of the community.

United Way recognized that it was necessary for local volunteer managers to build their skills to effectively manage volunteers and increase their organizations capacity to engage and retain volunteers in meaningful programs. UWWC developed and implemented the following initiatives to address the community need: Volunteer Engagement Program and Directors of Volunteers in Agencies (DOVIA) launched in 2008; UWWC Volunteer Center established in 2010 with a Volunteer Generations Fund (VGF) grant; Volunteer Management Certification Program developed and launched in 2011; expanded services to a nine county area with a Iowa Department of Human Services (DHS) contract to provide volunteer coordination services in the DHS service delivery area. Through these initiatives, UWWC has strengthened and expanded the volunteer engagement capacity of our community and are well positioned to implement sound programming with the RSVP program.

UWWC has experience in managing federal funding, including Volunteer Generation Fund Grant and an AmeriCorps State Planning Grant. Systems and controls have been put in place to effectively track and report grant requirements. UWWC staff receive continual professional development to ensure that they have the skills necessary to provide sound programmatic and fiscal oversight (both financial and in-kind) and day-to-day operational support is provided by the President/CEO to ensure compliance with the RSVP program requirements.

UWWC has sound program and fiscal policies and procedures in place and manages a budget of over \$750,000. The organization utilizes QuickBooks for its accounting software and program budgets are developed and monitored for all programs on site. The Finance and Operations Manager is the primary person responsible for fiscal management and is proficient in QuickBooks and accounting and is currently pursuing an accounting degree. The President/CEO has over 10 years of experience in non-profit management and the Volunteer Engagement Director has over 4 years of experience in program planning/evaluation and has directly managed the Volunteer Generations Fund Grant. The UWWC Finance Committee and Board of Directors review and approve monthly financial statements. Annually, UWWC certifies to United Way Worldwide that we adhere to standards that include comprehensive requirements for financial reporting, governance, ethics, diversity and operations.

## **Narratives**

UWWC manages cash and investment assets of over one million dollars. Currently UWWC leases the office space and therefore does not manage capital building and equipment assets but has built capacity to do so as part of the strategic plan.

An RSVP Project Director will be hired to manage and implement the RSVP program and be supervised by the Volunteer Engagement Director who will dedicate at least 10% of her time to developing and implementing the program. Program staff regularly work with financial staff to monitor the fiscal accountabilities and budget comparisons. The President/CEO meets with all program staff at least twice a month to review program performance and establish and monitor goals for the programs. The UWWC Board of Directors review regular reports on program accomplishments and evaluations.

### **Other**

N/A

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

N/A