

# Narratives

## Executive Summary

An estimated 400 RSVP volunteers will serve.

Some of their activities will include food delivery to homebound older adults, companionship and transportation for independent living, distributing health benefit information, providing food assistance services and support to address long term hunger, tutoring adults in building literacy skills, and home repair services for low income seniors.

The primary focus area of this project is Healthy Futures.

At the end of the three-year grant and as a result of RSVP volunteers, 108 homebound older adults receiving meal delivery services will report having increased social ties or perceived social support, and 60 economically disadvantaged individuals receiving home repairs will transition into safe and healthy affordable housing.

The CNCS federal investment of \$92,595 will be supplemented by \$39,684 in non federal share and \$22,848 in excess resources.

## Strengthening Communities

\* Describe the community and demonstrate that the community need(s) identified in the Primary Focus Area exist in the geographic service area.

The geographic service area for our incumbent RSVP is Kalamazoo County, and the VA Medical Center and Meals on Wheels in Calhoun County. RSVP began in 1973 in Kalamazoo County as a program of Senior Services, Inc. We expanded to Calhoun County in 1999 with the VA Medical Center, located just outside the Kalamazoo County line, and further expanded in 2012 when Senior Services began Meals on Wheels delivery to part of Calhoun County. On October 1, 2013, Senior Services will become the Meals on Wheels provider for all of Calhoun County resulting in a significant growth opportunity in that area for RSVP. As neighboring counties, Kalamazoo and Calhoun counties are located along I-94 about halfway between Detroit and Chicago.

According to the 2010 U.S. Census Bureau's, there are 250,331 people in Kalamazoo County, which includes 4 cities, 5 villages, and 15 townships. The City of Kalamazoo with over 78,000 residents is the

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county's largest municipality. Organized in 1830, Kalamazoo County is Michigan's 9th largest county and is home to Stryker Corporation, Pfizer Inc., Eaton Corporation, Western Michigan University, Kalamazoo College, and the Kalamazoo Promise (a unique program that provides up to a 100% college tuition scholarship to Kalamazoo Public School graduates). According to the 2010 U.S. Census, there are 136,146 people in Calhoun County, which includes 4 cities, 4 villages, and 19 townships. The City of Battle Creek with over 52,347 residents is the county's largest municipality. Organized in 1833, Calhoun County is Michigan's 17th largest county and is home to the Kellogg Company, Post Cereals, W.K. Kellogg Foundation, U.S. Department of Defense Federal Center, Duncan Aviation, VA Medical Center, and Fort Custer Industrial Park.

Senior Services, Inc., our sponsoring agency, operates in Southwest Michigan with the mission of enhancing and promoting the independence and well-being of older adults, adults with disabilities and those who care for them. As such, it was a natural fit to select Healthy Futures as our Primary Focus Area with RSVP volunteer efforts addressing the objectives of aging in place, access to care, and obesity and food. Within our geographic service area each of these objectives will be addressed in Kalamazoo County, while in Calhoun County we will only address aging in place - food delivery.

Aging in Place -- Food Delivery, Transportation, Companionship:

According to the 2010 U.S. Census Bureau in Kalamazoo County, people age 65 and older are 12% of the population and in Calhoun County they are 15%. American FactFinder (2011 American Community Survey) reports in Kalamazoo County 9.9% of those age 65 and older live below poverty, and 29% live alone; in Calhoun County 7.2% of those age 65 and older live below poverty, and 30% live alone. The Kalamazoo County Senior Growth Needs Assessment (2011) found 33% of seniors reported problems with performing regular activities including walking, eating and preparing meals; 14% reported problems with no longer being able to drive; 21% reported problems with having safe and affordable transportation available; and 29% reported feeling lonely or isolated. America's Health Rankings Seniors Report, United Health Foundation, A Call to Action for Individuals and their Communities (2013), says social isolation is linked to increased premature death, lower general well-being, depression, and higher levels of disability from chronic disease.

The AARP Public Policy Institute (2011) reports that nearly 90% of people over age 65 want to stay living in their home. However, older adults often lack resources to meet their instrumental activities of

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daily living like shopping and transportation due to decreased physical ability, being homebound, having low income and not having sufficient support of family or friends. Being able to accomplish basic activities improves a person's ability to care for themselves and live independently. The Michigan Office of Services to the Aging 2014-16 State Plan reports the percentage of people age 65 and older with a disability is 37%, with ambulatory difficulties, independent living difficulties, and hearing loss being the top three. The 2011-13 State Plan noted that transportation was the highest need for older adults and people with disabilities. A lack of reliable transportation often contributes to health decline, increased isolation, less medical care and poor nutrition.

National Resource Center on Nutrition and Aging (2011) says adequate nutrition is needed for health, functionality, and ability to remain at home. Michigan Office of Services to the Aging 2011-13 State Plan notes the need for nutrition services exist because older adults are susceptible to poor nutrition due to: lack of resources for healthy foods, poor health, frailty or disability limits ability to make meals, and lack of transportation to shop. The 2014-16 State Plan states nutrition services combat social isolation and offer links to other independent living services.

Access to Care -- Distributing Health Benefit Information, Health Education Coaching:

The Kalamazoo County Senior Growth Needs Assessment (2011) found that 34% of seniors reported problems with having adequate information or dealing with public programs (Social Security, Medicare and Medicaid); 35% reported problems with finding affordable health insurance; 29% reported problems with affording the medications they need; 61% reported problems with their physical health and 56% reported problems staying physically fit. According to the America's Health Rankings Seniors Report, United Health Foundation, A Call to Action for Individuals and their Communities (2013) Michigan's creditable drug coverage rate is one of the lowest in the U.S. at 83.2% of Medicare beneficiaries. A creditable plan must provide coverage for brand name and generic drugs, provide reasonable access to retail providers, pay on average at least 60% of participants' prescription drug expenses and satisfy one of several other conditions from the Centers for Medicare and Medicaid Services. The Medicare/Medicaid Assistance Program (MMAP) is Michigan's State Health Insurance Assistance Program (SHIP), offering free confidential health benefit counseling and assistance to older adults and people with disabilities. Created in 1990, SHIP is designed to help beneficiaries navigate an increasingly complex health care system.

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Public Health Reports, Self-Management Program: One Way to Promote Health Aging (2009) states that at least 80% of older Americans are living with at least one chronic condition, and 50% of them have at least two conditions. The American Hospital Association's report, When I'm 64: How Boomers Will Change Health Care (2007), states that 62% percent of 50-to-64 year olds reported they had at least one of six chronic conditions (hypertension, high cholesterol, arthritis, diabetes, heart disease and cancer). The American Hospital Association notes the economic burden of persons with multiple chronic conditions is substantial with roughly two thirds of Medicare spending going to persons with more than 5 chronic conditions, which are almost fully preventable through modified lifestyle factors. Kalamazoo County Senior Growth Needs Assessment (2011) found that 61% of seniors reported problems with their physical health and 56% in staying physically fit.

Obesity and Food -- Providing Services to Alleviate Long-Term Hunger:

Kalamazoo County Health Surveillance Book (2012) reports 11.9% of people were concerned with having enough food for themselves or their family in the last 30 days, with those earning less than \$20,000 being over 11 times as likely to be concerned. Adults aged 25-34 years old had the highest proportion of people reporting that they were concerned with having enough food; and black adults were over twice as likely as white adults to report being concerned with having enough food. American Fact Finder (2011 American Community Survey) reports Kalamazoo County poverty levels of 19.6% of the general population; 21.3% of children 18 and younger; and 38.6% of single parent females. Kids Count Data Book 2012 notes 47.7% of kids in Kalamazoo County qualify for free or reduced lunch. USDA Household Food Security in the U.S. (2011) says food security--access by all people at all times to enough food for an active, healthy life is necessary for a healthy and well nourished population. The USDA notes that food security includes at a minimum "the ready availability of nutritionally adequate and safe food" as well as an "assured ability to acquire acceptable foods in socially acceptable ways (this is, without resorting to emergency food supplies, scavenging, stealing, or other coping strategies)". Food insecurity is lack of consistent access to adequate food due to lack of money or other resources at least some time during the year. Hunger and Homelessness Mayors Survey (2011) states that "Food insecurity rates were substantially higher than the national average for households with incomes near or below the federal poverty line, households with children headed by single women or single men, and black and Hispanic households. When asked to identify main causes of hunger in their cities, 83% said unemployment, 65.5% poverty, 52% low wages, and 48% high housing costs.

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\* Describe how the service activities in the Primary Focus Area lead to National Performance Measure outputs or outcomes.

Aging in Place -- Food Delivery, Transportation, Companionship:

Output H8/Outcome H9: Number of homebound OR older adults and individuals with disabilities receiving food, transportation, or other services that allow them to live independently, and who reported having increased social ties/perceived social support.

Meals on Wheels provides 1 or 2 daily meals 365 days a year to 800 homebound older adults in Kalamazoo County and 600 homebound older adults in Calhoun County. The 90% scratch-made meals are prepared daily by Senior Services staff under the direction of a professional chef, and provide 1/3 of the daily recommended nutrition requirements. Meal options are designed to reduce chronic disease risk by limiting sodium, fat, cholesterol, sugar, and increasing fiber. The responsibility for coordination of services, supervision and support of volunteers is provided by three volunteer managers at one volunteer station -- Senior Services of Southwest Michigan with distribution locations in Kalamazoo and Calhoun counties. Senior Services registers homebound older adults requesting meals and provides an in-home assessment of their needs. As part of a network of over 250 volunteers, RSVP volunteers deliver meals to homebound older adults as drivers and hoppers (takes meal to the door) to meet nutrition needs, and provide regular social connections to support mental and physical health. Meal delivery occurs Monday through Friday (with frozen weekend meals delivered on Friday) 52 weeks a year. Each route takes about 2 hours. Some daily meals are delivered by volunteers through seven Congregate Meal locations in senior housing complexes. These delivery routes take about 30 minutes. 85% of meal recipients get a daily meal delivery, while 15% get one weekly delivery of frozen meals under the Choice Meal program. Volunteers serve twice a month or more often if desired, and are placed on regular routes to encourage consistent social relationships with the same seniors. At each meal delivery we expect volunteers to engage in conversation and check on the well-being of each person receiving a meal for an average of 5 minutes (for a total of 25 minutes each week for those getting daily meal delivery).

Output H8: Number of homebound OR older adults and individuals with disabilities receiving food, transportation, or other services that allow them to live independently.

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RSVP volunteers are matched with homebound or older adults and people with disabilities in their homes who are requesting independent living help. The responsibility for the coordination of services, supervision and support of RSVP volunteers is provided by volunteer managers at three volunteer stations -- Volunteers 4 Seniors, Friendship Village and Nazareth Center. RSVP volunteers provide companionship, and transportation to medical appointments, errands, and grocery store. Volunteers provide important social connections for older adults that support good mental and physical health. The companionship fosters social relationships that help combat isolation and enhance mental and physical health of those they visit. Volunteers may engage in conversation, play cards or games, go on short outings, or assist in reading and sorting mail. The transportation meets basic instrumental activities of daily living and the social interaction can help combat isolation and enhance mental and physical health of those they serve. As people require varying levels of supportive help, these independent living services may be provided on a short-term or long-term basis depending on the specific individual needs of the homebound or older adults and individuals with disabilities who are requesting assistance. On average, volunteers provide companionship twice a month and spend 1-2 hours each time they visit. On average, volunteers provide transportation once or twice a month or and spend 1-2 hours each month with each person they assist.

Access to Care -- Distributing Health Benefit Information, Health Education Coaching:

H2: Number of clients to whom information on health insurance, health care access and health benefits programs is delivered.

MMAP helps people apply for public benefit programs and educates them on Medicare and Medicaid programs. According to MMAPinc.org, MMAP counselors bring peace of mind to those who are often confused and frightened when they deal with unfamiliar and difficult government systems. The Regional MMAP Coordinator at Senior Services, Inc. is responsible for the coordination of services, supervision and support of a team of volunteers including those from RSVP. RSVP volunteers receive training by the State of Michigan to serve as MMAP counselors to help older adults and people with disabilities make informed decisions about health care benefits by helping them understand Medicare and Medicaid, compare or enroll in Medicare Prescription Drug Plans, review Medicare supplemental insurance needs, understand Medicare health plans, apply for Medicaid or a Medicare Savings Program, identify and report Medicare and Medicaid fraud, abuse or scams, and explore long term care insurance options. The State of Michigan provides a comprehensive 36 hour training to certify

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counselors, and 2 hours a month of continuing education training is required. On average, Counselors serve 2-4 times a month and spend an average of 3-4 hours assisting clients, and provide help by phone, at counseling, or at client homes.

H4. Number of clients participating in health education programs.

In *When I'm 64: How Boomers Will Change Health Care* (2007) the American Hospital Association says meeting future health care challenges will require more resources, new approaches to care delivery and greater focus on wellness and prevention. America's Health Ranking's Seniors Report, United Health Foundation, *A Call to Action for Individuals and their Communities* (2013) says to improve the health of our older population efforts must focus on changing the determinants of health. The Peer Prevention Players offers health education coaching to seniors. The responsibility for the coordination of services, supervision and support of the volunteers is provided by RSVP. Volunteers reinforce positive healthy behavior conducive to increasing the level of health and decreasing the need for medical treatment due to chronic illness and poor health behaviors. Health education material is presented verbally in an engaging way to older adults through humorous skits intermixed with jokes and poems. Through laughter, participants interact with the health information in a way unique allowing material to be more memorable than a lecture. The skits are creatively written by volunteers and the program coordinator with clear messages of healthy behavior choices based on verified health education content from local health education experts from Bronson and Borgess hospitals, the Area Agency on Aging's fall prevention and chronic disease self-management programs. Volunteers are available after the session for one on one attention to specific questions. Written information on areas of health concerns is also available for participants at the conclusion of sessions to reinforce learning. Volunteers share information about health behaviors which have an immediate or delayed positive effect on the health of older adults. By following the findings of the America's Health Rankings Report, Peer Prevention Players target smoking, obesity, physical inactivity, dental visits and pain management. Additional topics covered in this program are fall prevention, healthy eating and navigating Medicare Medicaid information.

Obesity and Food -- Providing Services to Alleviate Long-Term Hunger

H11: Number of individuals receiving support, services, education and/or referrals to alleviate long-term hunger.

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Loaves and Fishes promotes a hunger-free community through food access services. Through their programs they distribute food to about 300 households a day. In 2012 Loaves and Fishes provided food to 38,000 people at their grocery pantries, a 20% increase over 2011. They supply food to Communities In Schools Kalamazoo to pack and distribute weekend food packs to 725 students during the school year and summer school. As part of Loaves and Fishes network of 400 volunteers and through Communities In Schools Kalamazoo, RSVP volunteers address food insecurity by registering people for food assistance and distributing food. Volunteers serve at a call center to review eligibility and register people at a pantry, at pantries and Mobile Food Initiatives to distribute food, and at the warehouse to accept food donations and repackage bulk food items. They also pack and distribute weekend food packs for low-income students and distribute food through the Commodity Supplemental Food Program. Pantries are throughout Kalamazoo County in neighborhoods on easily accessible transport routes. At pantries people select their food items like you would in a store, and may get a four day nutritious food supply once a month. The Mobile Food Initiative is a first come first served monthly food distribution at seven community locations. Commodity Supplemental Food Program distributes food monthly to people 60 years of age or older who are at or below 130% of poverty, or women who are pregnant, nursing, or have children under age six who are not on WIC and are at or below 185% of poverty. We expect persons served by Loaves and Fishes to interact with volunteers about 30 minutes each time they receive services (which may be as little as once a year or as often as 1-3 times per month). Volunteers serve on average twice a month in various shifts depending on service position, and engage with individuals by phone through the call center or in person during food distribution. Communities In Schools Kalamazoo weekend food pack volunteers serve 3 hours on Fridays to pack and deliver the food packs to student lockers, and may interact briefly with students when they are delivering the food packs.

\* Your plan and infrastructure to support data collection and ensure National Performance Measure outcomes and outputs are measured, collected and managed.

Managing information and data is essential to demonstrating the impact of RSVP volunteers. We use consistent forms (application, time sheet, Memorandum of Understanding and Volunteer Station Data Sheet) to gather data from volunteers and volunteer stations. Forms are kept in volunteer and volunteer station files and entered in a database. We use the Volunteer Information System (VIS) database developed by the State of Michigan for consistent data collection by Senior Corps Programs

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statewide. The web-based VIS system produces reports and mailing lists, tracks volunteer and volunteer station information and hours, and data to assist in completing funder reports, work plans, and an RSVP annual impact summary. To collect data on volunteer participation, we require monthly time reporting by volunteers or volunteer stations in cases where a group time sheet is used. We send a monthly email reminder to volunteers to further encourage reporting. In developing the work plans, we communicated with volunteer stations to understand their methods for collecting data to report on outputs and outcomes (when noted). Our intent is to work within the current data collection methods and systems as much as possible so as not to place additional burden on volunteer station staff or jeopardize the confidentiality of those they serve. To assist in the collection, RSVP staff will work with station staff to ease the burden when feasible, such as helping tally data for the semi-annual and annual egrant reports. The work plans provide a detailed description of the output and outcome instruments, how data is collected and who collects the data. The types of instruments include client database, and client, activity, participant or attendance logs; and equipment tracking database. Data collection for outcomes are a client survey for Meals on Wheels (food delivery) to measure increased social ties/perceived social support, and for Tuesday Toolmen (home repair) a post project review and documentation by volunteer station staff to ensure that repairs and/or modifications were completed. In early 2014, all RSVP staff will meet with volunteer station staff at their locations to further review the data collection tools and methods to experience first-hand the use of the tools and methods, and work with the volunteer stations to make adjustments deemed necessary to achieve appropriate output and outcome measurements.

\* Describe any activity in service to veterans and/or military families as part of service in the Primary Focus Area, Other Focus Areas or Capacity Building.

Our greatest ability to serve and measure services to veterans is in Healthy Futures, specifically through Meals on Wheels. In addition, our work plan in Veterans and Military Families aims to place volunteers to serve Veterans at the VA Medical Center in Calhoun County in ongoing opportunities and through an annual 9/11 Day of Service Project. The RSVP Director will apply to serve on the VA Voluntary Service Advisory Committee to aid in further relationship building and understanding of the VA Medical Center, its services and volunteer engagement. This will be a small group of volunteers as our presence in Calhoun County will be considerably less than our presence in Kalamazoo County (as noted by our geographic service area). To the extent possible, we will gather data from volunteer stations on services to veterans in the areas of transportation and companionship services, distributing

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health benefit and health education coaching, and home repairs.

We track whether RSVP volunteers are Veterans through the RSVP Volunteer Application, and we maintain the data in the Volunteer Information System database. In our current program design, about 18% of RSVP volunteers are veterans, with about 60% serving at the Kalamazoo Air Zoo, an aviation history museum with military focused displays and exhibits, and 40% spread throughout other service activities, including those in our new program design. With our new program design aligned with focus areas and national performance measures, we will be graduating the Kalamazoo Air Zoo, along with other organizations. We will however, invite these volunteers to remain a part of RSVP by offering personal placement assistance for service opportunities available through our new program design.

### Recruitment and Development

\* Your plan and infrastructure to create high quality volunteer assignments with opportunities such as sharing their experiences, abilities, and skills to improve their communities and themselves through service in their communities. Your plan and infrastructure to ensure RSVP volunteers receive training needed to be highly effective means to addressing identified community need(s) in both the Primary Focus Area and in Other Focus Areas or Capacity Building.

Our engagement strategy is based on a volunteer-centered placement model designed to ensure that each person's experience, skills, abilities, interests and motivations for serving are discussed and considered when identifying and suggesting service activities. High quality service assignments are assured by working with all volunteer stations to develop defined volunteer roles with job descriptions including such information as: qualifications, responsibilities, training requirements, service commitment, shifts or schedules, pre-service screening requirement, and other expectations. After RSVP volunteers attend orientation, an RSVP staff member meets with them to discuss their experience, skills, abilities, interests and their motivation for wanting to serve. Based on this, we identify 3-4 service opportunities for them to consider and choose what is right for them. While our goal will be to direct people to our new program design portfolio of focus area service activities, we want to ensure a positive experience for people who seek our help in serving. With that in mind, if our focus area options are not a good fit, we will offer options from our other volunteer stations or posted with Volunteer Kalamazoo or Hands On Battle Creek, even if that means the person decides not to participate with RSVP. From there, RSVP makes referrals to volunteer stations or volunteers may choose to self-refer by contacting the volunteer station directly to begin the volunteer station's

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application or on-boarding process. To help ensure a positive and fulfilling experience, we encourage volunteers to make changes in their service activities if their expectations are not met. We offer placement services at anytime during a person's participation with RSVP.

As part of the Senior Services United Way funding agreement, we conduct an annual assessment with RSVP volunteers regarding their experience serving through RSVP. Using a team of three volunteers, each RSVP volunteer is called at the time of their birthday. On the call, volunteers are asked if they are satisfied with their volunteer opportunity and experience through RSVP, how they rate their quality of life since beginning their volunteer work, if they feel they are making a valuable contribution through their service, if they report their volunteer hours to RSVP, and if they find it easy to access the RSVP staff by phone, in person, or through email. Volunteers consistently report positive experiences with RSVP. Last year's results were 95.9% reported satisfaction with their service opportunity, 93.9% reported that their well-being had improved since they began volunteering, 99.7% feel they make a valuable contribution through service, and 98.7% said that the RSVP staff are easily accessible.

Our signed Memorandum of Understanding (MOU) with volunteer stations defines expectations for our partnerships, including the responsibilities of RSVP and of the volunteer stations. These responsibilities include the provision of any required training be fulfilled by the volunteer station. It is our belief that volunteer stations are the experts in preparing and equipping volunteers for service opportunities at their organizations.

It is important to note the community needs that RSVP will address that are outside of the Primary Focus Area -- Healthy Futures. We have selected as Other Focus Areas - Economic Opportunity, Education, Environmental Stewardship, and Veterans and Military Families, as well as Capacity Building. Economic Opportunity will focus on the objectives of housing (repairing homes) and employment (adult basic education -- literacy skills). Education will focus on the objectives of K-12 Success (tutors) and School Readiness or Other Education (comforting children). Environmental Stewardship will focus on the objective at-risk ecosystems (reusing materials). Veterans and Military Families will focus on the objective veterans and military families served (work with VA VAVS or VAMC).

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\* The demographics of the community serviced and plans to recruit a volunteer pool reflective of the community served.

Kalamazoo County (American FactFinder 2011): population 250,331; 37.9% under age 25; 38.6% age 25-54; 23.8% age 55+; 81.7% White, 10.9% African American, .4% American Indian/Alaskan Native, 2.1% Asian, 4% Hispanic; 18.6% in poverty (2007-2011 American Community 5-year estimates); unemployment 7.1% (Bureau of Labor Statistics). Calhoun County (American FactFinder 2011): population 136,146; 33.5% under age 25; 38.8% age 25-54; 27.7% age 55+; 82.2% White, 10.9% African American, .6% American Indian/Alaskan Native, 1.6% Asian, 4.5% Hispanic; 17% in poverty (2007-2011 American Community 5-year estimates); unemployment 7.3% (Bureau of Labor Statistics).

In 2000, we implemented RSVP -- Your Invitation to Volunteer, a name appealing to older adults who don't want to be labeled as retired or senior. Our message of "engaging people 55 and better; meeting community needs; and enriching the lives of volunteers", is incorporated into our branding. Volunteer stations are referred to as partner agencies reflecting our mutually beneficial relationship. To appeal to the broad demographic of people age 55 and better, we will continue to promote regular and episodic service options and flexible schedules or volunteer job sharing opportunities.

Our current volunteer roster is 94.8% White, 2.5% African American, 2.5% other races combined. It is clear that we must focus recruitment efforts on bringing more racial diversity among the people volunteering through RSVP, particularly those who are African American. The Foster Grandparent Program (FGP) and Senior Companion Program (SCP), that are also part of Senior Services, are successful in engaging African Americans in service. We will increase our collaborative recruitment with FGP and SCP to help us reach more racially diverse people. We will also reach out to people at food distribution sites, and senior housing, and through posting flyers at laundromats, grocery stores, restaurants, pharmacies and churches. In addition, we will forge relationships with organizations and faith-based groups that are located in neighborhoods that are predominantly African American including the Ecumenical Senior Center, Douglass Community Association, Northside Ministerial Alliance, New Genesis, and neighborhood associations.

Our recruitment plan includes several methods to spread the word about service activities. We keep current RSVP volunteers informed of service opportunities through email alerts and listing

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opportunities in RSVP's newsletter. We know that word of mouth produces the best results so we consistently encourage volunteers to tell others about their service, and invite them to contact RSVP to explore opportunities to volunteer. We will consider incentive programs for current volunteers to engage new people as RSVP volunteers. The Senior Services website and Facebook page features program news and service opportunities. We post opportunities with [www.VolunteerMatch](http://www.VolunteerMatch), Volunteer Kalamazoo's website and annual Guidebook publication, and Hands On Battle Creek website. A unique recruiting opportunity that we developed a few years ago is publishing stories about RSVP volunteers and their service monthly in Senior Times and Spark, regional publications that target senior and baby boomer readers. Readers in the community have learned about 45 volunteers in these articles that are aimed to inspire others to serve.

To gain visibility, we participate in community events like the annual Senior Expo and Senior Day at the Fair, and we make presentations to senior groups to raise public awareness for RSVP, share service opportunities, and recruit volunteers. We publish an annual Impact Summary to highlight RSVP and volunteer accomplishments, particularly in areas of significant impact. Stakeholders including volunteer stations, funders and volunteers receive an emailed version of the summary. The summary is utilized for public awareness and as a recruitment tool for volunteers and volunteer stations by making it available at community events and presentations, and on the Senior Services website.

We gain further visibility by participating in two national days of service, Make A Difference Day and 9/11 Day of Service. For Make A Difference Day we co-sponsor a week long community pet food drive with Cool 101 F, an oldies radio station designed to help older adult pet owners who may be struggling to care for themselves and their beloved dog or cat. Through the generous pro-bono on-air services provided by Cool 101 FM we have a unique opportunity to reach the community, particularly older adults, to tell them not only about the pet food drive but to tell them about RSVP and the work we do in the community and how they can share their time and skills as RSVP volunteers. For the 9/11 Day of Service we co-sponsor a community snack collection drive with the Foster Grandparent and Senior Companion program that results in snack pack care packages for inpatient mental health residents at the VA Medical Center. Volunteers prepare the care packages and the service project culminates with the delivery of the care packages by Senior Corps volunteers and staff at an afternoon ice cream social and engagement event with the inpatient mental health resident at the VA. These events allow us to involve the community and RSVP volunteers in short term projects that benefit

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many people and can give community members an opportunity to learn more about RSVP and how they can give their time to enrich the lives of others through service.

Our new program design aligned with national performance measures will result in the loss of not only volunteer stations but volunteers from our current active roster. However, this presents a tremendous opportunity to re-focus our efforts and direct the contributions of RSVP volunteers to critical need areas in our community. As such, over the three-year project periods we must grow our roster of volunteers in the service activities outlined in the work plans for the Primary Focus Areas, Other Focus Areas and Capacity Building. Our plans for recruitment include developing new marketing materials such as flyers and messaging, with the help of our Advisory Council and through potential pro-bono services from graphic designers that reflect our new program design aligned with the national performance measures in our work plans. It will also be critical to collaborate with volunteer stations on recruitment efforts. For example, we co-hosted a volunteer fair with Meals on Wheels as part of their expansion into Calhoun County, where the first person to serve was an RSVP volunteer.

As we grow our presence in Calhoun County, we will continue the relationship with Hands On Battle Creek initiated in 2012 with our expansion into that area when Meals on Wheels began serving a portion of the City of Battle Creek. Hands On Battle Creek offers services to assist in promoting service opportunities with Meals on Wheels and the VA Medical Center through their searchable website and social media outlets. Their expertise will be critical to help us integrate into the community and make connections with nonprofits and volunteer managers, as well as identify businesses, groups, events and other opportunities for volunteer recruitment, such as print publications to highlight service activities and stories of service, and opportunities to nominate volunteers for local awards.

\* Your plan and infrastructure to retain and recognize the RSVP volunteers.

The retention of volunteers begins with our initial contact and carries through our ongoing relationship. Senior Services, Inc. values excellent customer service and this transcends into how RSVP staff serve people who are interested in volunteering and those who become RSVP volunteers. When we connect with people who are interested in serving, we ask how they learned about RSVP, what their career or employment background is, what types of service experiences they have, and

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what types of activities they are interested in now. Next, in our user friendly application process we mailing or email an application and program materials (brochure, newsletter and list of service activities) to them. In 2014 we will revamp RSVP's internet presence on the Senior Services website with a contact form for people interested in serving, a link to a PDF fill-in version of the volunteer application, and a comprehensive list and details about service activities in our Primary Focus Area, Other Focus Areas and Capacity Building and how serving in those areas impacts the people of the community. RSVP reviews Volunteer Applications to ensure that people are age eligible for RSVP, and we invite them to attend a New Volunteer Orientation. At orientation we review the RSVP Volunteer Handbook which contains detailed information about placement assistance, maintaining active RSVP membership, volunteer benefits (mileage reimbursement, our complimentary insurance coverage, and a discount vision program), prohibited activities, how to report their volunteer time and request mileage reimbursement, and the need to measure the impact of their service and how they are an important part of that process. After orientation we discuss with each new volunteer their experience, skills, abilities, interests and their motivation for serving. Based on this we identify 3 or 4 service options for them to consider and choose what is right for them. RSVP makes referrals to volunteer stations or volunteers may choose to self-refer by contacting the volunteer station directly to begin the volunteer station's application or on-boarding process.

We know that relationship building and regular communication, interaction and support are critical to volunteer retention. To aid in this, we publish a quarterly newsletter that is mailed to volunteers and is available on the Senior Services website. The newsletter contains program news, special events, and service opportunities. We also share this information, particularly when it is time-sensitive with volunteers through an email management system called Vertical Response, and on the Senior Services home page and Facebook page. Retention is enhanced by extending supportive benefits to volunteers, including placement assistance at anytime, free supplemental accident, excess auto liability and personal liability insurance while serving and traveling to and from service activities, mileage reimbursement, recognition for service, invitation to a celebration, and free discount vision program membership.

Our recognition plan includes publishing monthly stories in regional publications about volunteers and their service, nominating volunteers for awards, and holding an annual volunteer celebration event featuring lunch, entertainment, recognition for service year milestones, and prizes. Our

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volunteer celebration is made possible by the generous contributions from community businesses who donate money and in-kind services. Annually, we thank volunteers in a community-wide newspaper ad during National Volunteer Week that is sponsored by Volunteer Kalamazoo (a Hands On affiliate) and the Kalamazoo Association of Volunteer Administrators. As we expand our presence in Calhoun County, we will continue our work with Hands On Battle Creek to assist us in integrating into the volunteer service community.

### Program Management

\* Your plan and infrastructure to ensure management of volunteer stations in compliance with RSVP program regulations, such as preventing or identifying prohibited activities.

RSVP staff ensures that volunteer stations are a public or nonprofit organization or eligible proprietary health care agency prior to completing a Memorandum of Understanding (MOU) and during each subsequent renewal process that occurs at least every three years. The MOU is signed prior to volunteer placement and provides for the safety, accessibility and reasonable accommodations of volunteers, and states that the volunteer station will not discriminate against volunteers or in the operation of its program on the basis of race; color; national origin, including individuals with limited English proficiency; sex; age; political affiliation; religion; or on the basis of disability. The MOU process includes the completion of Safety and Accessibility Checklist and a Data Sheet that specifies how the volunteer station engages people in service including reviewing or changing assignments, person responsible for orientation and supervision, composition of volunteer orientation, how hours are tracked, type of training provided, how volunteers are recognized, and if the volunteer station is able to provide in-kind support to volunteers. We provide a copy of the Volunteer Station Handbook that specifies the responsibilities of RSVP and the volunteer station. RSVP responsibilities include providing an orientation to volunteer station staff, referral of volunteers, furnishing volunteers with accident and liability insurance coverage, arranging for appeals or grievance procedures, assisting volunteers with transportation, monitoring service activities periodically, and assessing placements for safety and accessibility. Volunteer station responsibilities include contacting referred volunteers within 3 business days, responsibility for interviewing, screening and making final determinations of placement, providing a job description, implementing an orientation and required training, providing required materials for service opportunities, assisting volunteers with transportation when possible, providing for supervision and safety of volunteers, validating time sheets and data for reporting service impact, reporting accidents or injuries of volunteers to RSVP, supplying in-kind documentation and recognizing RSVP volunteers as such in publicity. The handbook also outlines prohibited volunteer

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activities such as taking part in political (partisan or nonpartisan) activities, engaging in religious activities; volunteer station will not request or receive compensation from volunteers or beneficiaries of volunteer service, nor will they discriminate against volunteers. On an annual basis volunteer stations receive the Volunteer Station Handbook and RSVP Volunteer Handbook. We maintain a hard copy file for all volunteer stations that contains current and historical MOU related documents.

\* Your plan and infrastructure to develop and/or oversee volunteer stations to ensure that volunteers are performing their assigned service activities.

In RSVP's 40-year presence in the community, we have developed relationships with countless people from more than one hundred nonprofits, schools and health care organizations. Relationship building and ongoing communication, interaction and support are critical to maintaining mutually beneficial partnerships with our volunteer stations. We maintain these connections and relationships by having all RSVP staff participate as members of the Kalamazoo Association of Volunteer Administrators (KAVA), formed to facilitate the exchange of information and to promote networking between nonprofit professionals working with volunteers. KAVA holds eight membership meetings annually that offer networking opportunities and professional development topics. KAVA provides a valuable forum for the RSVP staff to maintain connections in the nonprofit service community and meet new volunteer managers.

We utilize an RSVP Volunteer Opportunities form in conjunction with job descriptions to gather detailed information on each service activity, including job title, supervisor, description of service activity, skills required, schedule, other relevant information, and how the service will impact the organization and those they serve. These forms are available for quick reference and assist in preparing recruitment email alerts, recruitment listings for Senior Times (monthly) and the RSVP quarterly newsletter. Job descriptions are maintained in volunteer and volunteer station files. Once volunteers are placed at a volunteer station, RSVP staff maintain contact with the volunteer station through calls, emails, or site visits. For additional oversight of service activities we will make semi-annual site visits to volunteer stations that are part of our new program design work plans to meet with staff and observe RSVP volunteers engaged in service activities.

\* Your plan and infrastructure to meet changing community needs to include minimizing disruption to current volunteers as applicable and/or graduating stations as necessary.

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Our new program design will result in graduating volunteer stations and transitioning volunteers out of RSVP, or into new service activities that align with our performance measures. We must address the process of graduating stations and volunteers respectfully so as not to jeopardize the relationships we've developed over 40 years, nor the integrity of RSVP and Senior Services. To minimize disruption to current volunteers, we chose the volunteer stations to graduate that will impact the least number of stations and will maintain volunteers in areas of most community need. We will meet with each station that will be graduated to discuss RSVP's new program design from a national perspective and why we must end our partnership. We will seek their input on developing the most appropriate process to notify their RSVP volunteers of this change. We will inform all RSVP volunteers about our new program design, and for those that are serving at graduated volunteer stations we will invite them to consider volunteering in a performance measure service activity. Through normal volunteer attrition we also expect to reduce the number of volunteer stations, particularly in the community priority areas, where only a few volunteers are serving. We've used this attrition process over the years to move volunteer stations from active to in-active status. This will allow us to address new community priorities that may emerge, and consider new partnerships.

\* Your organization's track record in the Primary Focus Area, to include, if applicable, measuring performance in the Primary Focus Area.

As you'll read in the Organizational Capability section, Senior Services, Inc. was founded in 1963 to help seniors retain their independence with two programs -- home delivered meals and friendly visiting -- both utilizing volunteers to deliver these independent living services to older adults. After 50 years volunteers remain critical and integral to our service delivery model in these two areas and throughout the organization, including with the Medicare Medicaid Assistance Program which began in 1994 to provide health benefit information and counseling, and offering health education information through the Peer Prevention Players which began in 1994 to educate seniors on substance abuse prevention. Measuring performance is essential throughout Senior Services. In fact, we've had a Quality Improvement Quality Assurance planner on staff since 2006 to ensure that required systematic and comprehensive standards are met using methods to problem solve, and measure and improve performance according to agency and funder established requirements. Each agency program annually measures and reports on identified standards and outcomes. We are experienced with United Way logic models, and within our three Senior Corps programs we've implemented the various impact-based reporting and performance measurement methods over the years. For food

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assistance, RSVP has maintained volunteer station relationships with Loaves and Fishes since 1983, and with Communities in Schools Kalamazoo since 2003.

\* Your 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. RSVP maintains an Advisory Council that advises and assists the RSVP Director, RSVP staff and Senior Services in planning, developing, and implementing the program. The Council members include RSVP volunteers, volunteer station staff, a senior living community representative, the Foster Grandparent and Senior Companion Program Director, and retired writers and media personnel. We will get input from our current Council members for potential new members in the fall of 2013 to bring new skills and perspectives including experience with marketing and promotion, and from volunteer stations represented in our Primary Focus Areas and Other Focus Areas. We will focus on identifying people from diverse backgrounds and abilities to serve on the Council. The Advisory Council meets quarterly with the RSVP staff for a project update and to give input on program activities. Council committees meet throughout the year for promotion and recruitment, legislative advocacy and fundraising, nominating and council development, and volunteer recognition and special events.

Responsibilities of the Council are: provide advice and support to RSVP Director in the formulation of RSVP policies and development of operational procedures and practices; assist in promoting RSVP in the community, developing financial and in-kind resources, and conducting evaluation; ensure that procedures are in effect to hear an appeal regarding actions that have affected a volunteer adversely; provide information and advice to RSVP regarding strategies to utilize RSVP volunteers effectively, to coordinate and communication with volunteer stations and develop new stations; promote constructive relationships with individuals, legislators and community agencies; participate in planning and implementation of volunteer recognition; have the opportunity to review grant applications, if desired; provide input on recruitment of Council members and volunteers; and assist RSVP with special events or projects, such as community or recruitment events, and national Days of Service.

We maintain a roster of active volunteer stations, meaning we have a signed Memorandum of

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Understanding (MOU) to ensure that volunteers are placed appropriately. VIS tracks MOU initial and renewal dates, we keep hard copy records for volunteer stations that include a signed MOU updated and renewed every three years. All prospective volunteers complete an RSVP Volunteer Application, including a place to indicate birth date; their driver's license or state identification card is photocopied for verification. We review applications to ensure that volunteers are at least age 55.

### Organizational Capability

Senior Services, Inc. as the sponsoring organization operates in Southwest Michigan. The organization was founded 50 years ago in 1963 through a 1961 pilot project of the Kalamazoo Committee of Aging and Aged. The mission, simple yet profound, was to help seniors retain their independence despite their medical or financial situation. Headed by two Western Michigan University Professors and two concerned citizens, Pauline Allen and Helen Coover (who was the pilot project's first employee in 1961), they began Home Centered Services now known as Meals on Wheels (the second such program in the state) to deliver meals to seniors using volunteers, and Friendly Visiting to connect volunteers with lonely seniors. Seniors Services has grown from these two programs to over twenty programs including, Meals on Wheels, Congregate Meals, Medicare Medicaid Assistance Program (MMAP), Home Care, Tuesday Toolmen Home Repair, RSVP, Senior Companion Program, Foster Grandparent Program, Behavioral Health Services, MI Choice Medicaid Waiver Services, Navigator, Food For All and Catering. When our President and CEO, Bob Littke came to the organization 21 years ago the agency budget was about 1 million dollars, and has grown to more than 13 million. Senior Services has an all-inclusive model of service that Michigan's Governor, Rick Snyder, touted as "a model that governments can learn from" in his keynote speech at Senior Services' 50th anniversary celebration on July 25, 2103.

\* Your 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 to ensure accountability and efficient and effective use of available resources.

The agency has sponsored all three Senior Corps Programs for several years (RSVP -- 40 years, SCP -- 24, and FGP -- 14 years) and is very familiar with program requirements and regulations and has systems in place to ensure that conditions of the Notice of Grant Award are met. There is a Chief Financial Officer who oversees the fiscal operations of all agency programs. There is a system in place for receiving, expending, and accounting of federal and non-federal funds in addition to in-kind

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resources. An audit by an outside firm is conducted on an annual basis. The RSVP Director and the agency leadership staff work closely together to monitor program operations including fiscal oversight and budget development. The RSVP Director meets with her supervisor, the Business Development Director monthly.

Senior Services uses a Chart of Accounts that separates different funding sources. A segment of the account numbers distinguish between federal, state/local government and other (non-grant) expenses. For all cash expenditures (federal, non-federal, excess) program managers requisition expenses based on available funds. Requisitions are signed by appropriate leadership staff and sent to accounting for processing. A monthly budget worksheet for each program tracks federal, non-federal, and excess resources and expense, and is provided to program managers to assist them with program fiscal oversight. Cash and in-kind accounts are maintained separately and are shown on the monthly budget worksheet. The RSVP Director manages in-kind contributions and submits a quarterly report to accounting. The Senior Service's Board of Directors authorizes those staff members that can sign checks and at this time, the President & CEO and the Director of Community and Clinical Services have that authorization and they do not prepare the checks.

\* Clearly defined staff positions, identification of current staff assigned to the project and how these positions will ensure the accomplishment of the program objectives.

Volunteer Services Manager, Tracie Wheeler. The Volunteer Services Manager is a full-time position that is a Corporation for National and Community Service approved 80% RSVP Director (as noted in the budget) and 20% directing Volunteer Services for the agency. Tracie is an 18-year employee with RSVP and has been RSVP Director for the last 15 years. Her post secondary education is in health education, gerontology and management, and she has older adult programs experience. As the RSVP Director, Tracie directs the operations of RSVP for adherence to Corporation for National and Community Service and Office of Services to the Aging requirements, including collecting all RSVP program, grant, financial, volunteer, volunteer station and client data, and completing RSVP's federal and state report requirements and annual federal and state grants renewals. She manages the RSVP Advisory Council, maintains relationships with volunteer stations and nonprofit community, and manages volunteer station data in the VIS database. Tracie oversees work plan service activities related to food delivery, food assistance, home medical equipment collection and reuse, VA Medical Center, and capacity building. In directing the operations of Volunteer Services, she provides strategic

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recruitment, management and integration of volunteers (supervised by other Senior Services program staff) to positively impact Senior Services. This includes supervising the Foster Grandparent and Senior Companion Program Director, providing oversight of the RSVP, Foster Grandparent and Senior Companion program budgets, reporting and expenditures, and providing leadership for resource development, including grant applications, in conjunction with Senior Services' Business Development Director and Fund Development and Marketing Manager.

RSVP Special Projects Coordinator, Traci Furman. The RSVP Special Projects Coordinator is an 80% part-time position (as noted in the budget). Traci is a 6-year employee with RSVP. Her post-secondary education is in psychology, and she has experience in the education field and as a Peace Corps member. Traci is responsible for conducting orientation for all RSVP volunteers and providing placement assistance to new and current RSVP volunteers. Traci oversees work plan service activities related to youth and adult education, health education, and home repair services.

RSVP Support Services Coordinator, Kathy Cox. The RSVP Support Services Coordinator is a 67% part-time position (as noted in the budget). Kathy is a 9-month employee with RSVP. Her post-secondary education is in social sciences, and she is a former business owner with experience in marketing and nonprofit work. Kathy is responsible for maintaining RSVP volunteer files and data in VIS. She ensures that volunteer time sheets are processed each month and entered into VIS. She coordinates monthly volunteer assessment calls regarding their RSVP service experience. Kathy oversees work plan service activities related to independent living transportation and companionship services, and health benefit information and counseling.

The RSVP Director, Special Projects Coordinator and Support Services Coordinator each participate with the Advisory Council, and contribute to recruitment, communication with volunteers and volunteer stations, completing MOU's and related documents, recognition activities, special events, collecting service activity data from volunteers and volunteer stations, and oversight of community priority service activities.

Business Development Director, Tauhric Brown. The Business Development Director is a full-time position that spends 8% (as noted in the budget and charged to excess resources) of his supervising the RSVP Director and work of RSVP as part of the Senior Services executive leadership team. Tauhric is

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an 11-month employee with Senior Services. He served in the military, and his post-secondary education is in business. He is a former business owner with experience in sales, human resources, and customer service. Taurhic's work is focused on organizing, monitoring, evaluating and integrating the work of his division's programs into the agency's service delivery model while developing a customer service culture and new revenue streams for program and service sustainability.

The Information Technology, Reception, Facility Maintenance, and Customer Service staff members spend 2% (as noted in the budget as a historically charged expense and charged to excess resources) of their time supporting RSVP as one of 20 programs of Senior Services, Inc.

\* Demonstrates organizational capacity to:

- o Develop and implement internal policies and operating procedures to provide governance and manage risk, such as accounting, personnel management, and purchasing.

Senior Services has a CARF (Commission on Accreditation of Rehabilitation Facilities) Accreditation to show our commitment to quality improvement, a focus on the unique needs of those we service, and monitoring service results. CARF is internationally recognized for accreditation for agencies providing home and community services, substance abuse and addiction, rehabilitation, retirement living, or other health and human services. The accreditation process required that we examine our internal programs and business practices, followed by an on-site review by CARF in which we demonstrated compliance to comprehensive and international CARF standards.

In our 50 year history and to achieve CARF Accreditation, Senior Services has developed a comprehensive set of over 100 internal policies and procedures covering purpose; consumer based planning; accessibility, health and safety; governance, organizational structure (code of ethics, financial code of ethics, corporate compliance to name a few); organizational management; information management; program evaluation; financial management (fiscal management, equipment, purchasing, contracting, risk management, insurance to name a few); personnel (use of nonpaid staff and volunteers, cultural competence and diversity, professional development to name a few); rights of persons served; intake; orientation; and individual planning.

Senior Services employs nearly 200 people in full and part time positions including kitchen line staff to license social workers and nurses. Our Human Resource Specialist manages the new hire process in

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conjunction with leadership staff and program managers, and oversees the implementation of an annual employee performance review process and pay scale/salary review.

o Manage capital assets such as facilities, equipment and supplies.

Senior Services owns a 29,000 sq. ft. main facility and a 8,800 sq. ft. nutrition center that houses 20 programs, including the RSVP program. RSVP is provided 1.7% of the main facility space which provides adequate work and meeting space for 2.27 FTE staff members and necessary basic office equipment (computers, copy machines, printers, telephones, postage meter, fax machine) to conduct daily business. There are additional meeting rooms and presentation equipment (laptop, LCD projector, TV, DVD, VCR) as needed. We have a central supply ordering system managed by a Senior Services administrative support staff.

\* Demonstrates organizational infrastructure in the areas of robust financial management capacity and system and experience in managing federal grants.

Senior Services has a budget of over 12 million dollars comprised of federal, state and local grants, United Way funds, donations and program revenue. The budget is managed by a Chief Financial Officer and three accounting staff, under the supervision of the President & CEO and the agency Board of Directors. The Accounting Management Software is Cougar Mountain, and tracks all program revenues and expenses, including in-kind, accounts payable, accounts receivable and payroll.

Having been in existence for 50 years, Senior Services has a long and established track record for managing funds, including federal funds. Senior Services currently manages \$1,622,940 in federal funds from the Corporation for National and Community Service, U.S. Department of Agriculture, U.S. Department of Housing and Urban Development, and U.S. Department of Health and Human Services. We manage \$7,377,347 from the State of Michigan, and United Way funds totaling \$294,005. An audit is conducted annually by a full service accounting firm specializing in auditing nonprofits including those subject to governmental auditing standards.

### Other

NA - Not Applicable

### PNS Amendment (if applicable)

NA - Not Applicable