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## Executive Summary

The Evelyn Rubenstein Jewish Community Center of Houston (ERJCC) proposes to administer RSVP of the Texas Gulf Coast, a project providing older adult volunteer engagement services among the 10 Texas counties of Austin, Brazoria, Colorado, Ft. Bend, Harris, Liberty, Matagorda, Montgomery, Waller, and Wharton.

An estimated 500 RSVP volunteers will serve. Some of their activities will include: supporting aging in place by providing respite services, companionship, and home-delivered meals; supporting access to care by distributing information on Medicare insurance; addressing obesity and food by food pantry support; addressing education by assisting in classrooms at early childhood programs; and providing disaster services by performing outreach to educate the public on disaster preparedness.

The primary focus area of this project will be Healthy Futures. The project will also address activities in other focus areas, including Education and Disaster Services. At the end of the three-year grant, 325 individuals receiving independent living services will report having increased social ties/perceived social support, 50 caregivers of homebound or older adults/individuals with disabilities receiving respite services will report having increased social ties/perceived social support, and 150 children who complete early childhood education programs will demonstrate gains in literacy skills. These results will have been achieved through the work of 240 RSVP volunteers, representing 48% of the total volunteer corps serving in activities with measured outcomes.

The Corporation for National and Community Service (CNCS) federal investment of \$182,174 will be supplemented by \$123,250 in non-federal resources. The ERJCC has sponsored RSVP since 2001. RSVP of the Texas Gulf Coast forms a key component in the ERJCC's mission-centered portfolio of services to the greater community.

## Strengthening Communities

The ERJCC strengthens communities through its sponsorship of RSVP of the Texas Gulf Coast, which provides volunteer support for Healthy Futures, Education, Disaster Services, and Community Priorities among ten socially, economically and culturally diverse counties that comprise the Greater Houston area. RSVP of the Texas Gulf Coast's service area includes the counties of Austin, Brazoria, Colorado, Ft. Bend, Harris, Liberty, Matagorda, Montgomery, Waller, and Wharton. The ERJCC has

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sponsored the RSVP project serving Harris County since 2001 and expanded to serve the nine surrounding counties beginning in 2005. The service area's population lives in urban, suburban and rural settings, situated within a geographic area of over 10,000 square miles.

Harris County is the largest county served by the project, with a population of 4.1 million persons according to the 2010 US Census. It is the largest county in Texas and the third largest county in the United States. While Harris County is considered relatively young in comparison with other counties, the population is aging. Harris County's elderly population and projected growth exceeds national and state trends. By 2036, Houston's 200th birthday, adults over 65 will number 865,000 and make up 16% of the population. By 2040, the number is expected to climb to 985,000, almost three times the current number of just over 344,000. These growth trends represent challenges about which the aging services network must be cognitive in planning for future service needs.

According to the 2010 US Census, Harris County is a majority minority county, with non-Hispanic whites representing only 33.0% of the population. Black Americans made up 18.9% of the population. Native Americans made up 0.7% of Harris County's population. Asian Americans made up 6.3% of the population (2.0% Vietnamese, 1.2% Indian, 1.1% Chinese, 0.6% Filipino, 0.3% Korean, 0.1% Japanese, 1.0% Other). Pacific Islander Americans made up 0.1% of the population. Individuals from other races made up 14.3% of the population; people from two or more races made up 3.2% of the county's population. Hispanics and Latinos (of any race) made up 40.8% of Harris County's population. Persons over age 65 made up 8.4% of the county's population. A total of 17.3% of Harris County's population lives below poverty level.

The nine counties served by the project outside of Harris include Austin, Brazoria, Colorado, Ft. Bend, Liberty, Matagorda, Montgomery, Waller, and Wharton. Collectively, these rural counties represent a population of 1.6 million persons, with an average of 12.75% over age 65, and an average of 14.3% living below poverty level. According to United Way of Greater Houston, 1 in 4 children in the RSVP of the Texas Gulf Coast service region does not graduate high school, less than 50% of third-graders have the reading skills necessary for success in fourth grade, 69% of families are worried about their financial situation, 1 in 4 individuals is affected by alcohol or drug abuse, more than 1 million do not have health insurance, and 1 in 4 families is caring for an aging relative.

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The primary focus area of this project will be Healthy Futures. Planned service activities relating to Healthy Futures will include supporting aging in place by providing respite services, companionship, and home-delivered meals; supporting access to care by distributing information on Medicare insurance; and addressing obesity and food by food pantry support.

In "2013 Alzheimer's Disease Facts and Figures," the Alzheimer's Association reports that an estimated 5.2 million Americans of all ages have Alzheimer's disease in 2013. The number of Americans with Alzheimer's disease and other dementias will grow as the U.S. population age 65 and older continues to increase. By 2025, the number of people age 65 and older with Alzheimer's disease is estimated to reach 7.1 million--a 40 percent increase from the 5 million age 65 and older currently affected. In 2010, the number of person's with Alzheimer's disease in Texas was 340,000. There are currently over 40,000 members of the Texas Gulf Coast community that have Alzheimer's or other forms of dementia. More than 60 percent of Alzheimer's and dementia caregivers rate the emotional stress of caregiving as high or very high; more than one-third report symptoms of depression. Due to the physical and emotional toll of caregiving, Alzheimer's and dementia caregivers had \$9.1 billion in additional health care costs of their own in 2012.

According to Brenda Maust, executive director of Gathering Place Interfaith Ministries, a Gulf Coast area provider of respite services, "Ninety percent of the time, the person caring for someone with Alzheimer's isn't a trained professional but a child ill-prepared for the frustration and emotional pain of the experience. The chronic stress of caregiving is associated with physiological changes that indicate risk of developing chronic conditions. A series of recent studies found that under certain conditions some Alzheimer's caregivers were more likely to have elevated biomarkers of cardiovascular disease risk and impaired kidney function."

The 2012 United Way Community Assessment, published just this year, surveyed over 1,500 households among four of the ten counties served by RSVP of the Texas Gulf Coast. The survey found that there were significant elder care concerns in the community. Of the 1,500 households surveyed, 30% responded that at least one household member was involved in the care of an elderly family member and that 40% of the care they provided involved assisting with activities such as food preparation and errands, which are activities that support independent living for seniors who are aging in place. According to the assessment, caregivers struggle to balance personal time with the

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needs of an older adult. Lack of financial support, information regarding available services, and time management were cited as the most challenging issues.

According to the 2010 report, "Averting the Caregiving Crisis," prepared by the Rosalynn Carter Institute for Caregiving, today's family caregivers face an array of new challenges, including smaller, more geographically dispersed families, competing childrearing duties, and the need to balance work and caregiving. In addition, the type of assistance that caregivers provide has changed considerably. Today's care is of longer duration, often lasting five or more years. Among the report's conclusions are that the impact of caregiving on the caregiver has become the subject of heightened concern, due to research studies that have repeatedly shown that family caregivers have an increased risk of experiencing depression, grief, fatigue, and physical health problems secondary to exhaustion and self-neglect.

Trained RSVP volunteers will address the community need of respite services by volunteering an average of 4 hours per month in respite care programs, adult day care centers, and other appropriate group settings, where they will provide respite for caregivers by providing companionship and leading activities for older adults or individuals with disabilities affected by Alzheimer's disease, dementia, or other conditions requiring long-term care, along with providing other needed program support. Respite care provided by RSVP volunteers will assist caregivers by freeing up time that caregivers may utilize for performing important tasks or errands or for enjoying a few hours of needed rest. This is a companionship service activity which aligns with the Healthy Futures focus area objective of Aging in Place. Approximately 100 RSVP volunteers are expected to contribute to output H13 by providing respite to 75 caregivers of homebound or older adults, and to outcome H14 with the result of 50 caregivers reporting having increased social ties/perceived social support. The output will be measured by means of a client tracking database. The outcome will be measured by means of an annual survey of beneficiaries which solicits client feedback on outcome H14 along with additional information deemed by the RSVP project and volunteer station to be valuable for program evaluation purposes. Outcomes will be measured on clients that have participated in the program for at least three months of the year.

In 2002, the World Health Organization concluded that as the population ages and more people are living alone, social isolation among older adults is emerging as one of the major issues facing the

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industrialized world because of the adverse impact it can have on health and well-being. The Aging Texas Well Indicator Survey, conducted in 2009 by the Texas Department of Aging and Disability Services, found that 25% of older Texans reported loneliness as a problem. In 2008, The Aging Agenda of Houston-Harris County reported that 4.8% of residents in the Greater Houston area older than 60 suffer from depression. In addition, during 2006, 10.8% of residents 60 and over reported their mental health state as "not good" for five or more days. The same report notes that one-third of Americans older than 65 fall each year.

According to the Centers for Disease Control and Prevention (CDC), falls are the leading cause of injury-related death in adults older than 65 years. In 2009, the CDC found that approximately 20,400 older adults died from unintentional fall injuries. The CDC also reports that twenty to thirty percent of people who fall suffer moderate to severe injuries such as lacerations, hip fractures, or head traumas. These injuries can make it hard to get around or live independently, and increase the risk of early death. Frail elderly individuals that live alone, without a caregiver or family member nearby, are especially vulnerable to poor mental health or the potential for life-threatening falls due to their social isolation. Deaths continue to be attributable to the fact that by the time anyone became aware that an isolated elderly person had a problem it was too late to intervene.

Trained RSVP volunteers will address the community need of independent living services by volunteering an average of 1 hour per week providing a form of companionship by making regularly scheduled weekday check-up phone calls to homebound or older adults and individuals with disabilities to support their safety, security, and well-being. RSVP volunteers will alert appropriate emergency responders should the clients fail to answer. This is a companionship service activity which aligns with the Healthy Futures focus area objective of Aging in Place. Approximately 35 RSVP volunteers are expected to contribute to output H8 by providing telephone companionship to 75 older adults or individuals with a disability, and to outcome H9 with the result of 50 older adults or individuals with a disability reporting having increased social ties/perceived social support. The output will be measured by means of volunteer activity logs. The outcome will be measured by means of an annual survey which solicits client feedback on outcome H9 along with additional information deemed by the RSVP project and volunteer station to be valuable for program evaluation purposes. Outcomes will be measured on clients that have participated in the program for at least three months of the year.

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As people age, the chances increase that they will develop chronic illnesses and conditions that limit their ability to perform routine tasks, including purchasing and preparing nutritious meals regularly. The Meals on Wheels Association of America reports that 59% of home delivered meals recipients reported having three or more diagnosed chronic illnesses or conditions (2001). According to the Meals On Wheels Association of Texas, in 2012 the average age of the people helped by Meals on Wheels programs in Texas was 76; more than half lived alone; 70 percent were women; more than 50 percent of those to whom meals were delivered lived at or below the federal poverty line, some on as little as \$670 or less per month. A March 22, 2013 local Fox news affiliate reported that over 4,500 seniors in the Texas Gulf Coast area receive home-delivered meals. The report also indicated that, due to federal sequestration, funding for meals has dropped and all area meals-on-wheels providers maintain extensive waiting lists for services. For some homebound seniors, the daily home-delivered meal may be the only hot, nutritious meal they eat in a day. According to the Kronkosky Foundation Meals on Wheels Research Brief published in May 2013, the benefits of home-delivered meals extend beyond supporting nutrition to include reducing isolation and providing social interaction and support through daily interaction with meal delivery volunteers.

Trained RSVP volunteers will address the community need of independent living services by volunteering an average of 1 hour per week packaging and delivering nutritious meals to homebound or older adults and individuals with disabilities. RSVP volunteers will provide caring and nurturing human contact and social support to clients. This is a food delivery service activity which aligns with the Healthy Futures focus area objective of Aging in Place. Approximately 90 RSVP volunteers are expected to contribute to output H8 by providing home-delivered meals to 400 older adults or individuals with a disability, and to outcome H9 with the result of 275 older adults or individuals with a disability reporting having increased social ties/perceived social support. The output will be measured by means of activity logs. The outcome will be measured by means of an annual survey which solicits client feedback on outcome H9 along with additional information deemed by the RSVP project and volunteer station to be valuable for program evaluation purposes. Outcomes will be measured on clients that have participated in the program for at least three months of the year.

According to the 2010 US Census, there are currently almost 550,000 Medicare-eligible persons residing within the 10 counties served by RSVP of the Texas Gulf Coast. On January 1, 2011, the

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oldest members of the Baby Boomer generation celebrated their 65th birthday. For the next 19 years, every day 10,000 baby boomers will reach age 65 and age into the federal insurance program known as Medicare. The aging of this huge cohort of Americans (26% of the total U.S. population are Baby Boomers) will dramatically change the composition of the country. Understanding Medicare and the costs is important to seniors understanding how to fully access their benefits. According to a September 26, 2011 New York Times article, about \$100 billion is stolen from Medicare through fraud and abuse. According to Candace Twyman, executive director of the Better Business Bureau Education Foundation of Houston which administers Senior Medicare Patrol programs throughout Texas, an estimated \$4 billion in Medicare funds are lost to fraud and abuse in Texas alone. Medicare information programs can help beneficiaries avoid falling victim to Medicare fraud and abuse.

Trained RSVP volunteers will address the community need of Medicare education by volunteering an average of 2 hours per month providing information on Medicare at workshops, community events and forums. Information provided will include instructions to beneficiaries on how to protect their Medicare account information, detect possible errors or fraud on statements, and how to report suspected errors or fraud to appropriate authorities. This is an information distribution activity which aligns with the Healthy Futures focus area objective of Access to Care. Approximately 50 RSVP volunteers are expected to contribute to output H2 by providing Medicare insurance information to 1,000 clients. The output will be measured by means of activity logs that will track information on the settings of presentations or information distribution efforts along with numbers of clients provided with information on Medicare insurance. The RSVP project will collect and monitor output data from activity logs semi-annually to ensure progress.

According to a fact sheet published by the Houston Food Bank in October of 2012, 865,000 individuals need assistance with food each year throughout the Houston Food Bank's 18-county service area, which includes all 10 counties served by RSVP of the Texas Gulf Coast. A total of 1,059,184 people, which represents 16.7% of the service area's population, live in poverty, with one in four children living at or below poverty level. 18.4% of the service area's population is food insecure. Emergency situations, such as loss of a home due to fire or flood, burglary or theft, or sudden unemployment, leave individuals and families without needed food resources, or the financial resources that would be needed to obtain food and supplies. In the case of natural disasters, the food pantries are looked to as a source of relief. In 2011 the Houston Chronicle reported that in the regions served by RSVP of the

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Texas Gulf Coast more than 1,800 homes and businesses were evacuated due to wildfires caused by one of the worst droughts in Texas' history. Many homeowners and business owners returned after the wildfires to empty lots. The Texas Gulf Coast region includes many flood-prone areas. Hurricanes and tropical storms also wreak havoc in these areas. Many families depend on food pantries for immediate relief. A study by the Houston Food Bank in 2010 found that more than 90% of the area's food pantries rely on volunteers, and that 68% of the pantries were faith-based, such as congregations and social service ministries.

Trained RSVP volunteers will address the community need of emergency food by volunteering an average of 4 hours per month at area food pantries providing individuals needing emergency food assistance due to unforeseen circumstances such as fire, theft, illness or unexpected unemployment. Service activities may include interviewing and registering clients, sorting, stocking, packing, and distributing emergency food supplies. This is a food pantry support activity which aligns with the Healthy Futures focus area objective of Obesity and Food. Approximately 50 RSVP volunteers are expected to contribute to output H10 by providing emergency food to 500 individuals. The output will be measured by means of tracking forms that record unduplicated clients served, dates of service, cause of emergency need, and other information relevant to the service activity. The RSVP project will collect and monitor output data from tracking forms semi-annually to ensure progress.

Of the 433 volunteers currently serving with RSVP of the Texas Gulf Coast, 43 are veterans, 37 of whom serve in activities in the Primary Focus Area. While all of the activities being addressed by the project in the Primary Focus Area have the potential to serve veterans and likely are doing so, the volunteer stations through which these activities are performed do not consistently track the military status of beneficiaries. RSVP of the Texas Gulf Coast will work with its volunteer stations in the first year of the grant to find ways of effectively and efficiently tracking this information, so that both the project and volunteer stations may benefit from the knowledge gained concerning RSVP volunteer service to veterans and their families.

### **Recruitment and Development**

The RSVP of the Texas Gulf Coast project assures high quality experiences for volunteers by designing, in consultation with partnering organizations known as volunteer stations, high-quality outcome-based volunteer assignments, each of which is outlined in a formal assignment description addressing duties, skills required, and typical time commitment. The project is aware, that in order to better serve

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the newest generation of older adult volunteers, many of whom have held executive and leadership positions in the corporate community, opportunities on par with the expectations of these types of volunteers are essential, and the project has created assignments that appeal to such volunteers.

Over the course of its 12 years of providing volunteer engagement services, the project has also discovered that there are many retired volunteers who have little desire to become involved in volunteer activities that equate to the jobs from which they have retired. Opportunities for building new skills different from their existing ones are all the more important for these volunteers, and the project has worked closely with volunteer stations to ensure that appropriate training opportunities are available that allow volunteers with little to no experience in a particular activity to gain the new skills they desire through formal training as well supervised on-the-job training.

Agreement to provide training is a fundamental component of the Memorandum of Understanding the project executes with its volunteer stations. Volunteer assignment training is therefore provided by each volunteer station for the roles that RSVP volunteers will play within their organizations. Training provided by the volunteer station is performed with a view of supporting the development of new skills for the volunteers, as well as providing the specific skills necessary to make a measureable impact on the community needs the assignments are designed to address.

The project's primary focus area is Healthy Futures. Gathering Place Interfaith Ministries of Brazoria County is a volunteer station that employs a multi-day training program for respite care volunteers that includes components such as classroom instruction, observation, mentoring, and hands-on activities with clients, in order to train volunteers in both the theory and practice of working with Alzheimer's and dementia clients and providing much-needed respite for their caregivers. The Are You OK Program provides classroom training and for the benefit of home-bound disabled volunteers a telephone-based training on how to perform check-up calls to homebound elderly clients to ensure that they are well and have not fallen or become ill, and how to contact appropriate responders should the client fail to answer at the appointed time of their daily call. The project's several meal delivery stations each provide classroom and hands-on training relating to nutrition, the special needs of homebound and disabled persons, preparing meals for delivery, executing the deliveries, and how to look out for client health or safety issues during their social interactions with the clients. Training provided by project-supported food pantries, such as the Society of Samaritans and Dacus Food

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Pantry, is primarily on-the-job, with experienced volunteers demonstrating to trainees the intake process and procedures that are followed for providing emergency food support. Training provided by the BBB Education Foundation for the Senior Medicare Patrol takes the form of up to three days of classroom instruction covering all facets of Medicare, including Medicare fraud and abuse, as well as how to perform public speaking engagements. Trainees perform presentations to the class and receive constructive feedback from the instructors and their peers.

The meaning of service to volunteers and the community is also addressed during the training process by both the RSVP staff and the representatives of the volunteer station staff. Beginning at the time when volunteers are interviewed and provided with assignment options related to their particular area of interest, emphasis is placed on the importance of the community impact the activity will make. The project expects that each volunteer's quality of life will be enhanced through their volunteer experience, and the achievement of this outcome has been repeatedly confirmed in surveys of the project's volunteers. When project coordinators perform quarterly site visits, they engage RSVP volunteers serving at the volunteer station in dialogue about their experience and the lessons they have learned in the course of service. The project also performs an annual survey of volunteers to determine whether RSVP has supported their health and well-being. In its next annual survey, the project plans to incorporate questions into the survey which inquire about the volunteers' experiences and motivation for volunteerism, as well as what they have gained by way of skills and meaningful experiences. The responses will be reviewed for insights provided, as well as to guide the project in making adjustments to the program that enhance its effectiveness.

In addition to the aforementioned types of training, development of a local curriculum is currently underway that will assist RSVP volunteers in engaging in qualitative reflection upon their volunteer activities, focusing on how RSVP volunteers feel their service enhances and supports their own well-being as well as that of their communities and their client beneficiaries. Planned for execution in small groups of volunteers, the project anticipates that this course will prove a valuable enhancement of the volunteer experience for RSVP participants.

Project staff members have received training on the demographics of the project service area and the importance of engaging volunteers reflective of the area's population. Harris County, the service area's largest and most diverse county, according to the 2010 US Census is a majority minority

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county, with non-Hispanic whites representing 33.0% of the population. Black Americans made up 18.9%. Native Americans made up 0.7%. Asian Americans made up 6.3%. Pacific Islander Americans made up 0.1%. Individuals from other races made up 14.3%, and people from two or more races made up 3.2%. Hispanics and Latinos (of any race) made up 40.8% of Harris County's population. Staff members make concerted efforts to perform outreach in minority communities throughout the service area. The project works with organizations such as the National Hispanic Council on Aging and community centers serving specific populations such as the Chinese Community Center and Vietnamese Community Center, to provide information on RSVP volunteer opportunities, utilizing translators where needed in order to communicate with the audience. The project has found communities of faith to be especially effective locations to disseminate information about RSVP within the African American community. The project also works with United Way of Greater Houston and the Michael E. DeBakey VA Medical Center to market RSVP to veterans.

In general when seeking to recruit new volunteers, project staff members review local newspapers, the Internet, and other resources for volunteer recruitment leads. Leads are also gained from older adult organizations affiliated with churches, service organizations, community centers, neighborhood associations, AARP chapters, Red Hat Societies, etc. The prospective recruitment venue is then contacted and a presentation scheduled by an RSVP staff member who explains to volunteer prospects the nature and goals of RSVP and how RSVP can connect older adults with meaningful service opportunities that make an impact on needs in their communities. Available volunteer assignments are highlighted in these presentations, sometimes generally, and when appropriate, in a targeted way for the purpose of increasing support for a particular planned outcome.

Staff members also attend various networking meetings provided by area United Way Service Centers and other professional and community organizations, where they connect with potential new community partners and prospective volunteers. Whenever possible, in addition to their regular outcome-based assignment, RSVP volunteers are utilized as capacity builders within the organizations where they serve, and aid in recruiting other volunteers by sharing from their personal experiences the benefits and rewards they have derived from their volunteer activities. Ongoing efforts are made to develop relationships with corporations that have employees who are preparing to retire, for the purpose of providing the valuable service of coaching the pre-retirees in how to enhance their experience of retirement through the incorporation of volunteer service.

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The ERJCC utilizes its media contacts for the purpose of publicizing RSVP of the Texas Gulf Coast and its volunteer accomplishments as a means of increasing awareness of RSVP and facilitating new volunteer engagement. Project coordination staff members regularly contribute volunteer and volunteer station success stories, which are used as the basis of news releases and which often result in published information that generates inquiries from prospective volunteers who wish to know more about the ways they can serve with the project. These contacts receive follow-up within 24 hours by project staff.

RSVP of the Texas Gulf Coast also utilizes electronic resources such as a project website ([www.rsvpvolunteers.com](http://www.rsvpvolunteers.com)), a fan page on the nation's largest social networking site ([www.facebook.com/rsvpofthetexasgulfcoast](http://www.facebook.com/rsvpofthetexasgulfcoast)), a Twitter feed (@rsvptxgulfcoast) and an account on VolunteerMatch.com to engage new volunteers. These tools have been very useful in publicizing the project's areas of impact and volunteer opportunities and have resulted in the engagement of many new volunteers, a high percentage of whom are members of the Baby Boomer generation.

Once an interested volunteer prospect has been identified and has indicated an interest in volunteering, a project coordinator schedules an interview with the prospect that provides a face-to-face opportunity for dialogue and further exploration of the prospect's interests and goals in regard to volunteer service. Utilizing a well-constructed enrollment form as a guide, the project coordinator leads the prospect through an informal yet effective reflection upon his or her talents, skills, interests, and past volunteer experience, as a means of assisting the project coordinator in narrowing the range of placement opportunities to a few options that would seem to best appeal based on the information gathered from the prospect. These opportunities are presented informally to the prospect in order to gauge his or her interest. Once interest in one or more opportunities has been piqued, formal assignment descriptions are provided to the prospect to review. The project coordinator then answers any questions the prospect may have concerning the expectations and planned outcomes of the assignment or assignments. Where deemed advantageous, the project staff member may involve the appropriate station representative in the discussions in order to clarify any questions, especially in regard to training requirements and assignment duties. Once a prospect has made a formal decision to volunteer for an assignment, appropriate enrollment information is taken by the project coordinator. Orientation on the benefits, policies, procedures, and reporting requirements of RSVP membership is

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provided to the volunteer, along with information on any additional requirements for service that are unique to the chosen volunteer assignment, such as the station's application, criminal background check, and training requirements.

When a new volunteer is placed at a station, the project coordinator conducts follow-up phone calls within the first month of volunteer service with the station representative as well as the volunteer to ensure that the volunteer is satisfied with the assignment and that the station is satisfied with the volunteer. Volunteers are encouraged to immediately contact the RSVP project coordinator if they are dissatisfied or having difficulties at any time or if they desire information on additional volunteer opportunities or would like a change in assignment. Semi-annual follow-up phone calls are also provided in order to assure ongoing volunteer satisfaction.

Annual regional volunteer recognition events that promote volunteer retention are planned and hosted by project staff and community advisory council members. Advisory council members play a crucial role in helping the project staff design events that are appropriate for the cultures of their local communities, as well as in assisting the project in obtaining local community resources in support of the events. Typical features of RSVP of the Texas Gulf Coast recognition events include catered luncheons, including awards presentations to outstanding volunteers, recognition gifts for all volunteers, keynote speakers, and entertainment, the latter of which is obtained either at no cost or through excess sponsor funding resources. Supplemental financial sponsorships of the volunteer recognition events are solicited from reputable senior service providers as well as the community at large. In-kind support is also obtained in the form of door prize donations for drawings held throughout the course of each event. Volunteer station representatives are also recognized during the events, and gratitude expressed to them for their roles in volunteer training, supervision, and management, as well as for their assistance in tracking volunteer time and impact, and for their general support of older adult volunteerism. RSVP of the Texas Gulf Coast also features coverage of the events in its newsletter, as well as local news media whenever possible.

RSVP of the Texas Gulf Coast also promotes volunteer retention through other volunteer support benefits, including volunteer insurance coverage for all RSVP volunteers and limited mileage reimbursement for RSVP volunteers providing home-delivered meals to homebound seniors in rural areas.

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To enhance the project's ability to recognize and retain volunteers, the project staff engages in ongoing efforts to develop value-added benefits for volunteers beyond the standard benefits required by CNCS. Such benefits have included special RSVP days/nights at sporting and community events (e.g., Houston Astros, Shrine Circus, Houston Rockets, Houston Dynamo, Houston Home and Garden Show, etc.), which provide existing volunteers with additional retention benefits and provide volunteer prospects with additional incentives to serve with RSVP. The project's most recently added benefit consists of educational workshops for volunteers and volunteer stations covering topics of interest to volunteers, such as "Avoiding Compassion Fatigue," "Enhancing Communication by Improving Listening Skills," "Success in Goal Achievement," and "Developing Time Management Skills." The workshops are open to all of the community partner's volunteers, whether or not they are RSVP members, as well as to their staff. They have been very well received both by volunteers and volunteer station representatives. Due to the community's recognition of RSVP of the Texas Gulf Coast as a resource in the field of volunteer administration, many community organizations have requested the project to present the aforementioned and other workshops for their staff and volunteers. Such organizations have included the Houston Association of Volunteer Administrators, the Harris County Area Agency on Aging, the Houston-Galveston Area Council, the Texas Association of Regional Councils, the National Association of Children's Museums, the Texas Senior Corps Association, the Brazoria County Alzheimer's Awareness Network, and the United Way of Greater Houston.

### **Program Management**

All RSVP grant-funded staff members have received extensive training in the statutes, regulations, and Office of Management and Budget (OMB) circulars governing the program. Each staff member maintains current copies of the program regulations and RSVP Operations Handbook, along with a locally-developed project reference manual that outlines the program's operating procedures and which contains an appendix of forms and reports employed to ensure project progress and compliance. These resources serve as useful reference tools to help answer questions that volunteers or volunteer station personnel may have concerning RSVP and its policies and procedures.

Project coordinators perform a minimum of two site visits per year to monitor the volunteer stations for compliance, observe and interact with volunteers performing their assignments, and provide any training or technical assistance needed by volunteers or volunteer station representatives. The project coordinators use a compliance monitoring tool developed by the project as a guide for volunteer and

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station personnel interviews and to point out specific compliance issues that must be met. Project coordinators note the activities RSVP volunteers are observed performing during the course of their visit. If prohibited activities are observed, such as the giving of religious instruction by RSVP volunteers or RSVP volunteers engaging in political activities while on assignment, appropriate training is provided on prohibited activities along with information on the possible consequences of continued non-compliance.

Project coordinators are also trained to make a visual assessment as to the general accessibility and safety of the volunteer station for comparison with the station's annual accessibility and safety survey. Project coordinators also interview the designated volunteer station representative to ensure that he or she is familiar with and maintaining copies of the RSVP Memorandum of Understanding, RSVP volunteer enrollment forms and time records, records of any accidents or incidents involving RSVP volunteers, RSVP volunteer assignment descriptions, and measurement tools and records relating to performance measure outputs and outcomes. Volunteer station representatives are also asked about any current placement opportunities the station may provide for persons with disabilities or limited language proficiency, so that the project may note the availability of such opportunities in its records. Assurances are also obtained that no remuneration is provided to RSVP volunteers for their service and that RSVP volunteers do not displace employed workers. If a program reference manual cannot be produced by the volunteer station representative when requested by the project coordinator, a copy is immediately provided. Any additional training or technical assistance needed by the volunteer station representative is either provided or scheduled for provision a later negotiated date. Once the site visit is concluded, a compliance monitoring report form is completed by the project coordinator, filed in the project's volunteer station records, and a copy forwarded to the project director for review.

The project conducts annual surveys of its volunteers and volunteer stations that assist in assessing the effectiveness of the project in addressing community needs and providing meaningful service opportunities for volunteers that enhance their lives and the lives of their beneficiaries. The results of annual surveys as well as volunteer output and outcome data are analyzed by project staff and community advisory councils for the purpose of gauging the project's overall effectiveness and impact upon its targeted community needs. The project also enlists the assistance of the University of Houston's Graduate School of Social Work once every three years in the design and execution of a more extensive program evaluation. The data and findings of this broader program evaluation are

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very helpful to the project in its efforts to improve services and address needs, and the findings are shared with the CNCS State Office.

Over the course of its 12-year sponsorship of RSVP, the ERJCC has demonstrated sensitivity in regard to changing community needs and has assessed these changing needs through a combination of research and soliciting community input through surveys and feedback from the project's regional advisory councils, while ensuring that its activities remain consistent with CNCS service priorities.

After information was made available through the 2012 Senior Corps Virtual Conference on the specific details of national performance measurements required by the 2009 Edward M. Kennedy Serve America Act, the ERJCC immediately began to assess the RSVP project to determine which among the host of activities its RSVP volunteers were performing would align with the new performance measurement system. This process was coordinated by the project director, supervised by the senior associate executive director, and assisted by the regional RSVP advisory council members.

Volunteer assignments were reviewed, and where needed, clarification was obtained from volunteers or volunteer station personnel concerning the specifics of certain volunteer activities. This information was then analyzed in light of performance measurement requirements in order to determine whether a given activity could be retained or whether it was out of alignment with CNCS and project priorities. Volunteer assignments determined to be out of alignment were then evaluated to determine whether they addressed local community priorities.

Once the analysis was complete, the RSVP advisory councils recommended aligning the project with national performance measures through 7 service activities, with a primary focus on Healthy Futures, and reducing the overall volunteer corps to approximately 500 from its erstwhile size of approximately 1,200. The ERJCC subsequently filed an amendment to its grant for the purpose of aligning its activities with national performance measures according to the recommendations adopted by the advisory councils. The proposed amendment was subsequently approved by CNCS.

To implement the project's new design, it was necessary to graduate volunteer stations whose activities did not align with national performance measures. Preparation was made for these changes

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by informing volunteers and volunteer stations during the assessment process that considerable changes in regard to programmatic design and direction were in the offing. The project had also maintained a long-standing policy implemented as far back as 2002 that enabled it to disengage from stations that were not addressing community needs through impact measurement. Volunteer stations were already familiar with this policy.

Once the amendment was approved by CNCS, correspondence was prepared that diplomatically explained changing performance priorities and the need to bring to an end the partnership with certain volunteer stations whose activities did not align. Assurance was given that this change would in no way disqualify RSVP volunteers from continuing their service with a graduated station if they chose to do so, though they would not perform that service in the context of RSVP membership. Correspondence was also prepared to inform RSVP members that would be affected by the changes, explaining the planned changes, and this correspondence was held for distribution until one week following the station correspondence. Dates of termination of MOU's or service assignments were provided along with the project director's contact information in case of questions.

While disappointment was expressed to the project director by less than a half dozen each of volunteers and volunteer station representatives, a number also expressed understanding of the needed changes, given the increasing scarcity of federal funding resources for such programs as RSVP. On the whole, the process was remarkably smooth and effective.

The ERJCC does not anticipate any need for further adjustment to current volunteer station partnerships or volunteer assignments connected to the work plans contained in this grant application, since the project's design is already aligned with those work plans. However, if additional adjustments are needed, whether due to volunteer station cooperation and performance or future changes in community needs or CNCS performance measure priorities, the aforementioned process of assessment and graduation, given its success, would be employed again.

The ERJCC has a very successful track record in addressing the Healthy Futures service activities proposed in this application. Through RSVP, the ERJCC has provided volunteer engagement and support for independent living through the provision of home-delivered meals for seniors for 12 years. Companionship in support of independent living has been provided for 7 years. Emergency food needs

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have been addressed through food pantry support for 12 years. Respite for caregivers has been provided for 4 years, and supporting access to care through information on Medicare and Medicare fraud and abuse has been provided for 3 years.

Performance in the area of food delivery to seniors and persons with disabilities is measured in partnership with volunteer stations through annual client surveys. The surveys collect a variety of data of interest to the volunteer stations, such as the clients' general satisfaction with the service provided by meal delivery volunteers, the quality of the meals provided, and the timeliness of deliveries. In addition, the surveys collect outcome data required by the RSVP project, including whether the client has experienced increased social ties/perceived social support as a result of the food delivery. In the most recent reporting period 92 RSVP volunteers served 1,141 homebound older adults or individuals with a disability with weekday home-delivered meals and 1,027 of those served indicated they experienced increased social ties/perceived social support.

The RSVP project partners with telephone reassurance programs to provide a form of companionship by making weekday check-up calls to homebound seniors to support their safety and well-being and reduce their sense of isolation. In partnership with volunteer stations, clients are surveyed each year concerning the service provided and to collect information about other perceived needs. In the most recent reporting period 10 RSVP volunteers served 85 homebound older adults through weekday calls and 77 of those reported that they experienced increased social ties/perceived social support.

The RSVP project partners with food pantries to provide emergency food to individuals and families that have experienced emergency situations such as the loss of home or property due to fire or flood, sudden unemployment, severe illness, and other emergency situations. Output data is collected through volunteer logs completed at the time of service. These volunteer logs track the clients served, the reason food was needed, and the amount of food provided. In the most recent reporting period 43 RSVP volunteers provided emergency food to 1,468 individuals in need of short-term assistance.

The RSVP project partners with respite care programs to provide respite to caregivers of homebound older adults or individuals with a disability. This service provides caregivers with needed support and time to accomplish tasks that would otherwise be neglected due to the demands of constant caregiving. Volunteer stations perform an annual survey of the caregivers served, which among other

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things, measures the performance of RSVP volunteers in addressing the outcome of increased social ties/perceived social support. In the most recent reporting period, 109 RSVP volunteers provided respite care by providing day care programs for persons affected by Alzheimer's disease and other forms of dementia resulting in 42 caregivers being served, with all 42 indicating that they experienced increased social ties/perceived social support.

The RSVP project's most recent addition to its activities addressing Healthy Futures is in the area of supporting access to care for Medicare-aged beneficiaries by providing information on Medicare, along with information on how to avoid falling victim to Medicare fraud and abuse. Performance in this area is measured by volunteer time and activity logs that collect output data about the numbers of persons to whom information on Medicare and Medicare fraud and abuse is provided through speeches and information fairs. In the most recent reporting period, 73 RSVP volunteers provided information to 8,621 beneficiaries and their caregivers on Medicare and how to detect and report possible incidents of fraud or abuse relating to their Medicare account.

The RSVP project's collaboration with volunteer stations in the design and execution of performance measurement has resulted in a body of data that provides evidence of the impacts that RSVP volunteers are making on the critical needs the project addresses in its service area. This data is helpful to the RSVP project in documenting its successful track record in addressing community needs with older adult volunteers. The data may also be utilized by the participating volunteer stations for their own purposes, such as demonstrating evidence of community impact to their stakeholders or demonstrating organizational mission success.

The ERJCC has solicited community input into the design, operation, and evaluation of its RSVP project since taking up sponsorship of RSVP in Harris County in 2001, when it established its first RSVP Advisory Council. Upon expanding the RSVP service area in 2005, three additional regional community advisory councils were created to provide input from the nine counties surrounding Harris. All four of the RSVP Advisory Councils include in their membership local government officials, business owners, social service providers, community leaders, citizens from diverse socio-economic, racial, and ethnic backgrounds, and older adults. The project's success in strengthening the communities it serves is due in no small part to the input provided by community advisors in the areas of strategic planning, identification and prioritization of needs, volunteer engagement and retention,

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professional development, resource development, program evaluation, and outcomes measurement. Members of the community advisory councils are chosen primarily on the basis of their skills and expertise in these areas, and include members who reflect the racial, ethnic and socio-economic diversity of the communities served.

RSVP of the Texas Gulf Coast maintains a system of physical files and a computer database to aid in project management and ensure that eligibility criteria applying to volunteers and volunteer stations are being met. The database is contained within a volunteer management software program which facilitates the management of volunteer and volunteer station demographic information. The volunteer software, to which all project staff members have access, enables tracking of volunteer assignments, ensuring that volunteers are serving only in positions in volunteer stations with a current MOU. The software is used to compile volunteer and station roster reports as well as generate reports on volunteer time and impact.

The RSVP administrative assistant generates a monthly report from the program management database indicating volunteer stations whose MOU's are due for renewal in the upcoming quarter and supplies this report to the project director and four regional project coordinators, who begin the renewal process and thus ensure that all MOU's are in force and up-to-date. Quarterly reviews are performed on all volunteer and volunteer station files to ensure that all required documentation is in place, including current MOU's, lists of assigned volunteers, signed volunteer enrollment forms with documentation of age and other demographics, and volunteer assignment descriptions documenting duties and date of assignment. Checklists are maintained in each file to ensure all documents are present, and project staff reviewers initial and date the checklist after each file review. Monthly rosters of volunteers and volunteer stations are also generated that contain volunteer demographic and service data. These reports are reviewed by the project director and project coordinators regularly as an additional safeguard to ensure service eligibility and progress.

### **Organizational Capability**

The ERJCC ensures day-to-day programmatic and fiscal oversight through its full-time RSVP project director, senior associate executive director, and director of finance. The project director has 7 years of experience in managing the project and receives annual training relating to federal statutes, regulations, and OMB circulars governing RSVP. In the past year alone, the project director has participated in over 50 classroom hours of programmatic training provided through the Texas Senior

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Corps Association (Statewide Conference), the Corporation for National and Community Service (State Office Quarterly Conference Calls, Southwest Cluster Conference, Senior Corps Virtual Conference), and a peer-led RSVP workshop. Topics of training have included grant application improvement, prohibited activities, recent compliance findings for Senior Corps programs, grants management, and other relevant topics. The project director, through staff oversight, document control, reports review and analysis, performance measurement results review, financial review, preparation of budgets and budget projections, and other appropriate means, ensures that the project remains compliant with program statutes, regulations, and OMB circulars. This together with the project director's oversight of staff ensures accountability and the effective use of program resources, as well as ensures that the project is progressing toward the achievement of its annual performance goals. The project director meets bi-weekly with the 4 project coordinators and administrative assistant to review recent and upcoming activities and to ensure progress is being made towards particular assigned goals and tasks. In turn, the project director receives supervision by the senior associate executive director, who meets with the project director weekly to review the status of the program, its finances, and the project staff, to further ensure accountability, support, and resources needed for achievement of the project's purposes and goals. The senior associate executive director has received 8 hours of training this year on CNCS regulations and requirements through participation in the Senior Corps Virtual Conference. The senior associate executive director and director of finance also review all financial transactions of the project to ensure compliance with program regulations.

The key staff positions responsible for RSVP project management include the following:

\* Project Director -- The project director has worked in the non-profit sector providing senior services for 22 years, and has a combined 7 years of experience as the project director of RSVP. He is responsible for supervision of the project staff, the daily functions of the program as well as administration, budgeting, compliance, fundraising, and working with the five regional RSVP Advisory Councils. The project director holds Certificates in Pastoral and Theological Studies. He currently serves as the president of the Texas Senior Corps Association, the assistant secretary of the Area Planning Advisory Council of the Harris County Area Agency on Aging, and has served on many other boards and advisory councils relating to senior issues and basic human needs services. The project director also designed and maintains websites and social networking pages for the project as well as for the 55 projects of the Texas Senior Corps Association.

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\* Full-Time Project Coordinator (Harris County) -- The project coordinator for Harris County coordinates activities for the RSVP project within a portion of Harris County. This project coordinator has been with the project for 11 years, and is primarily responsible for recruitment of volunteers, station development, recognition events, and providing training and technical assistance to volunteer stations.

\* Part-Time (24 hrs/wk) Project Coordinator (Western Counties) -- The project coordinator for Western Counties coordinates all activities for the RSVP program in Austin, Colorado, and Waller counties, including recruitment of volunteers, station development, recognition events, and providing training and technical assistance to volunteer stations. This project coordinator has an extensive background in business management, marketing and journalism.

\* Full-Time Project Coordinator (Southern Counties) -- The project coordinator for Southern Counties coordinates all activities for the RSVP program in Brazoria, Fort Bend, Matagorda and Wharton counties, including recruitment of volunteers, station development, recognition events, and providing training and technical assistance to volunteer stations. This project coordinator has served with the project for 4 years and has an extensive background in non-profit program management.

\* Part-Time (24 hrs/wk) Project Coordinator (Northern Counties) -- The project coordinator for Northern Counties coordinates all activities for the RSVP program in Liberty and Montgomery counties, including recruitment of volunteers, station development, recognition events, and providing training and technical assistance to volunteer stations. This position was added in early 2010 with the assistance of a private foundation grant. This project coordinator holds a Master's degree in Public Planning, and has been responsible for considerable program expansion in the underserved counties of Liberty and Montgomery.

\* Administrative Assistant -- The administrative assistant has worked for the ERJCC for 14 years, 6 years of which have been spent serving with RSVP. The administrative assistant has many years of experience in accounting and data management and is responsible for data entry, monthly report preparation, records maintenance, mailings, and general clerical duties.

Additionally, the RSVP project and two other Senior Corps projects sponsored by the ERJCC receive oversight by the senior associate executive director of the agency, who has nearly 40 years of experience in overseeing senior services and other programs sponsored by the agency.

The ERJCC maintains job descriptions for staff members which clearly outline where the staff fit in

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the overall ERJCC picture and how each specific job contributes to the program objectives. The ERJCC maintains a system of review, evaluation and assessment of program and staff which serves as a guide for program improvement and staff development. Each staff member is evaluated every six months. Annual performance goals are developed jointly each year between staff members and their supervisors. Monthly accomplishments of objectives are reported by staff members to their supervisors and progress towards the achievement of annual goals by each staff member is monitored by the responsible supervisor. Additional support is provided by supervisors as needed, in order to ensure that supervisees succeed in achieving their annual goals for the benefit of the program and the professional development of the staff member.

The ERJCC maintains a sophisticated accounting system with appropriate checks and balances in place to ensure accountability and efficient and effective use of available resources. The ERJCC maintains a chart of accounts and performs job cost center accounting with transactions posted daily to the general ledger. The reconciliation of cash receipts and disbursements are handled by different ERJCC accounting staff members, as are the authorization and maintenance of records of financial transactions. Statements of revenue and expense are prepared on a monthly basis by the accounting staff and are reviewed by ERJCC executive and department head staff to ensure the appropriateness and correctness of expense allocations to cost lines and sub ledgers. ERJCC accounting, executive, and department head staff members also have access to up-to-the-minute financial information via the electronic accounting system. Budget projections are prepared on a monthly basis by department heads and reviewed by executive and accounting staff. The ERJCC utilizes a high-quality accounting management software program and an automated payroll system. Appropriate documentation of expenses, such as invoices and receipts, are maintained by the accounting staff along with all purchase orders and petty cash request forms. Purchase orders are reviewed by accounting staff and department heads to ensure that expenses associated with federal grants are consistent with OMB-122 cost principles.

The ERJCC has developed and maintains written policies concerning agency financial controls, delegations of authority, procurement, and federal funds use. In regard to personnel matters, the agency maintains an employee manual containing all policies relating to employment, such as those governing staff conduct, timekeeping, travel, vacation and sick time, background checks, progressive discipline, equipment use, and other policies and operating procedures.

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The ERJCC employs a Chief Financial Officer with a Master's in Professional Accounting and 18 years of experience, Director of Finance with a Master's in Business Administration and 30 years of experience, and managers of Payroll and Benefits, Accounts Receivable, and Accounts Payable, each of which have Bachelor's degrees in Accounting and a combined 20 plus years of experience. The ERJCC also maintains a permanent Finance Committee consisting of board members chosen for their expertise in financial management. The Finance Committee meets monthly to provide monitoring and oversight of the agency's financial affairs.

Annual independent audits are completed on all federally funded programs as well as the agency as a whole by a CPA firm specializing in performing A-133 audits. The firm has extensive experience in working with non-profit organizations that receive federal grant funding and provides valuable guidance and recommendations in how to ensure that all federal grant requirements are met and compliance maintained. Any recommended improvements in regard to management and accounting practices receive due attention and response by the agency. The annual independent audit is reviewed and accepted by the agency's Audit Committee, Chief Executive Officer, Chief Financial Officer, and Board of Directors.

The ERJCC has received and managed federal grant funds through the Older Americans Act (Title III) for more than 30 years. The agency has received CNCS funds for administration of the Senior Companion Program for the past 21 years, RSVP for the past 12 years, and the Foster Grandparent program for the past 6 years. Project monitoring and fiscal audit reports indicate success on the part of the ERJCC in ensuring compliance with rules and regulations governing federal grant programs. The ERJCC's track record in successfully managing volunteer programs, programs for seniors, and outcome-based programming is excellent.

### **Other**

Not applicable.

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

Not applicable.