

# Narratives

## Executive Summary

The target population of the Retired and Senior Volunteer Program (RSVP) is seniors 55 years of age and older. Our goal is to enhance the well-being of seniors through meaningful volunteer opportunities and to help these seniors maintain a positive self-esteem and self-image.

San Antonio RSVP has implemented a comprehensive volunteer service program characterized by three critical features. The first feature is the development of meaningful volunteer placements. RSVP creates partnerships with 501(c)(3) nonprofit agencies and public entities that benefit from the time, experience, and commitment of the 55 plus population. The second feature is maintaining the volunteer experiences through meaning opportunities and rewarding work that give back to the community and contribute to the well being of our volunteers. The third feature is volunteer recognition. Systematic formal and informal recognition greatly contributes to elevated life satisfaction and continued participation, which in turn prevents and reverses isolation.

An estimated 800 RSVP volunteers will serve through San Antonio RSVP. Some of their activities will include mentoring, tutoring, money management, guardianship, food distribution, and military and veteran support. The primary focus area of this project is Education. At the end of the three year grant, we anticipate 120 students will improve academic performance as a result of tutoring/mentoring from RSVP volunteers and 180 will report increased food security. The CNCS federal investment of \$114,052.00 will be supplemented by \$57,128.

## Strengthening Communities

Description of community and community need(s) identified in the Primary Focus Area exists in the geographic service area: The City of San Antonio is a vital urban environment with unique strengths but with pervasive urban problems that are common to many major metropolitan areas. Growth in San Antonio has been geographically uneven. The largest pockets of middle class population growth have occurred on the north side of San Antonio and outside Loop 410, leaving inner city areas with a disproportionate share of economically disadvantaged groups. According to Texas Workforce Commission the 2012 unemployment rate for Bexar County was 6.6% (up from 4.8% in 2008) and the 2011 US Census Bureau reports that 17.9% of the population in Bexar County live below poverty level. Data gathered in 2012 by County Health Rankings & Roadmaps (CHRR), a program of the University of Wisconsin (CHRR) reported that 36% of households with children in Bexar County are single parent households and 25% of households with children are in poverty.

One of the biggest disadvantaged groups in the city is low-income, at-risk youth. As education is

## Narratives

one of the biggest determining factors for future success in youth, Catholic Charities RSVP has embraced Education as the Primary Focus Area. For San Antonio Independent School District alone, 40% of the 2012 class failed math when test through STAAR, 35% failed reading and the district has a 12.5% dropout rate; this information was provided by the Texas Education Agency and similar results are reflected in the Judson Independent School District with test scores reflecting 28% failing math and 24% failing reading, with an annual dropout rate of 12.3%. Although the numbers are slightly improved in the North Side Independent School District with 19% of students failing math and 16% of students failing reading, the information provides working numbers for our RSVP volunteers to refer to in addressing the needs of this population. San Antonio youth are in desperate need of supportive services and education is a key element in directly addressing change.

With the Primary Focus Area for San Antonio RSVP being education, volunteer service will focus its efforts on tutoring/mentoring students from k-12 grades. RSVP volunteers will be placed in the public school setting and perform mentoring/tutoring activities in the classroom of the students in need and of whom they choose to work with. These services will be provided on a weekly basis and will be carried out for the duration of the school year and the students summer school sessions. Volunteers will provide one-on-one assistance to each student at a time. Sessions average between 30 minutes to 1 hour and will be spent on improving academic engagement. Some of our currently participating schools include: Adam Hill Elementary, Cody Elementary, Fisher Elementary, Pease Middle School, Esparza Elementary, Neff Middle School, and Zachry Middle School.

How service activities in the Primary Focus Area lead to National Performance Measure outputs or outcomes: One-on-one tutoring/mentoring is proven to have one of the greatest impact in affecting the improvement of youth development in academic performance and behavior. According to the National Dropout Prevention Center/Network mentoring programs have proven to be effective with many different youth groups and is extremely effective with youth in at-risk situations. the National Dropout Prevention Center/Network reported, "when students who have dropped out of school are asked, "Why did you drop out of school?" The typical reply is: "No one cared if I stayed in school or what!" Mentoring is a one-to-one caring, supportive relationship between a mentor and a protégé that is based on trust. The mentor is simply a wise and trusted friend with a commitment to provide guidance and support for the mentee to develop their fullest potential based on their vision for the future."

Through RSVP efforts in providing volunteers to tutor/mentor at-risk youth, we expect to serve an estimated 200 students through grant period with at least 120 students demonstrating an improved

## Narratives

academic engagement.

Plan/infrastructure to support data collection and ensure National Performance Measure outcomes and outputs are measured, collected, and managed: In order to collect effective data on output/outcome pairs the programs output instrument will be the public school's attendance log from each school our volunteers choose to be placed at. Volunteers (mentors) will be paired to students (protégé). Outcomes will be tracked through a series of surveys. Surveys will be administered to the teachers of the students our volunteers will work with prior to RSVP volunteers initiating activities in the schools and again upon the end of an activity cycle (the end of a school year) in order to provide measurable outcomes for the educational activities volunteers engaged in for the year. The "raw data" will be collected from each school according to their academic calendar/schedule and will be entered into the RSVP database and then stored by RSVP staff in a secure office with limited access.

Service to veterans and/or military families as part of service in the Primary Focus Area, Other Focus Areas or Capacity Building: San Antonio RSVP currently has one site signed up to serve veterans and is performing ongoing outreach in efforts to include additional service sites. The current site is Operation HomeFront it will service the veteran military community by providing food assistance, supporting wounded warrior wives program, and other individuals. Stations such Operation HomeFront will service the veteran military community by, referrals and housing assistance, etc. Catholic Charities RSVP embraces the ultimate goal of growing the services in support of Veterans and military family support.

In effort for the program to reflect capacity building, the Volunteer Income Tax Assistance (VITA) Program provides volunteers with opportunities through station partnerships with San Antonio RSVP will promote economic opportunity by providing free tax preparation and electronic filing of federal and state income taxes for the elderly, handicapped, low income, and other individuals.

### Recruitment and Development

Plan/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: In 2007, the Corporation for National and Community Service published "The Health Benefits of Volunteering: A Review of Recent Research," a report that revealed the health benefits of volunteering. These benefits include positive social psychological factors, lower levels of depression, decreased intensity in chronic pain, and lower mortality rate. This is no doubt due to the socialization and satisfaction of helping others that volunteerism provides. Therefore, our focus is to offer socialization opportunities to keep these seniors active in meaningful volunteer activities to help

## Narratives

them maintain positive self-esteem and self-image, ultimately resulting in the preservation of their well-being. San Antonio RSVP wants to ensure that the quality of each volunteer's life will be enhanced as they engage themselves in meaningful work and see the results of the service they provide the community.

In order to help seniors attain greater life satisfaction and prevent and reduce the residual affects of isolation, we have implemented a comprehensive volunteer services program characterized by three critical features.

The first feature is the development of meaningful volunteer placements. Staff works throughout the year identifying and screening potential placement sites. Although it is important that these sites provide needed community services, it is more important that they offer a successful, safe experience for our volunteers so they will continue participating. The majority of participating volunteers continue with the program. Their tenure and activity is tracked through quarterly follow-up calls and through annual evaluations.

The second feature is the maintenance of diversity in volunteer experiences. Almost all of our volunteers say their primary reason for remaining active is the opportunity to give something back to others, but each individual's definition of what the wish to give back and to whom is different. Therefore, staff always have available an extensive variety of opportunities-- from school tutoring/mentoring opportunities and giving museum tours to providing management assistance to non-profits--requiring a myriad of different skills.

The third feature is volunteer recognition. Many of the volunteers come to us with very low feelings of self-worth. They do not believe they are capable of making any kind of a contribution, much less one that someone might thank them for. Systematic formal and informal recognition greatly contributes to elevated life satisfaction and continued participation, which in turn prevents and reverses isolation.

The program staff assesses the interests, work and life experience, and ideas about volunteer service at the first interview of individuals wishing to join the volunteer services program. After obtaining basic information, the staff begins comparing requests for volunteers with individual talents. Factors considered include geographic boundaries established by the applicant, hours of volunteer availability, physical restrictions, type of service to be delivered and possible benefits to the volunteer.

RSVP distributes an annual life satisfaction survey to every volunteer enrolled in the program to measure perception of self-worth, level of isolation, sense of control and sense of health. The survey asks questions designed to encourage the volunteers to reflect on their past year of service and the

## **Narratives**

impact it has had on the community. Staff will also support the volunteers by providing a station orientation, relevant resources, supervision while serving, recognition/appreciation, safe working environments, meal and/or transportation reimbursement, and testimonials of other volunteer's service activity.

The life satisfaction survey is administered to every client, first during the initial interview and annually thereafter on or near the client's anniversary date. An annual evaluation form is mailed to all participating sites by the program staff. The purpose of this evaluation is to maintain an open line of communication with all of our participating sites. This evaluation measures satisfaction, training needs, outreach success, and benefits the sites have from having volunteers. The information gathered in all three instruments is cross-referenced as a means of ensuring accuracy of response. For example, if an individual's life satisfaction Survey is not as positive as we would like, the volunteer hours and the annual evaluation Survey will be checked for further indications of problems.

Plan/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: All volunteers will take part in an initial orientation and a majority of RSVP volunteers will receive training at their volunteer stations. The training process for each particular volunteer station is developed by both the station and RSVP staff and is outlined in the station's Memorandum of Understanding (MOU). Volunteers will be oriented on RSVP policies and procedures by program coordinators. Once volunteers begin their service, they are provided transportation and/or meal reimbursement upon request. RVSP staff will participate in volunteer station site visits to meet with volunteer station supervisors and/or volunteers as well as the stations liaison. The RSVP coordinators keep records and prepare reports as required; as well as provide supervision during site visits, adequate recognition of volunteers for services being provided to youth, and ensure the safety of the volunteers while on site.

RSVP coordinators will provide volunteers support through orientations and will act as a resource for volunteers seeking more information or insight into their position and site activities. Coordinators will provide supervision during site visits, adequate recognition for services being provided to youth, and ensure the safety of the volunteers while on site. This will help ensure that a high quality experience will be obtained by volunteers in addition to offering diverse opportunities and an on-going relationship between volunteers and RSVP staff. Additionally, volunteers will have the opportunity to learn new skills as they are trained in their volunteer position.

Once the RSVP coordinators and the volunteer have decided upon a placement, he or she is trained

## Narratives

in the duties required. The primary purpose of the training is to ensure that the volunteers know and recognize the limits to their service. Catholic Charities carefully screens potential volunteer sites to ensure they meet volunteer interests, Primary Focus and community needs. Today's volunteers work in diverse public and private settings. Typical placements include working one-on-one in the public schools with children in special education or others who are not performing at grade level and tutoring and mentoring in schools.

Demographics of the community served and plans to recruit a volunteer pool reflective of the community served. This could possibly include: individuals from diverse races, ethnicities, sexual orientations, or degrees of English language proficiency: According to "A Profile of Older Americans: 2009," a compilation of data collected by the U.S. Department of Health and Human Services Administration on Aging, it is estimated that there will be a 36% growth in the population of adults 55 plus by the year 2020, therefore growth in the area of volunteerism is to be expected. Volunteers will reflect the general demographics of the community of San Antonio/Bexar County. In 2011 the US Census Bureau estimated 20% of Bexar County population at 55 years and older; 35% of that total is over 55 and Hispanic, 7% Black or African American and 30% White (non Hispanic).

Recruiting efforts take place at different geographical locations throughout the service area. With various local organizations, churches and other community entities that support diverse cultures. These efforts will be continued during the present program year and re-evaluated for impact prior to the development of next year's outreach plan. Volunteers will be recruited through a variety of outlets in both English and Spanish. The RSVP staff implements a volunteer recruitment plan that involves face-to-face volunteer and station recruitment presentations for active adult communities, employers, nonprofit organizations, religious and faith based organizations and civic centers.

Active volunteers have proven to be our most effective outreach tool. To reinforce these word-of-mouth testimonials, local radio, television and newspaper media (such as radio station KEDA, the Express-News, Southside Reporter, Senior Sentinel, KENS-TV, and KMOL-TV) promote volunteer opportunities and other topics of interest to senior citizens of various and diverse backgrounds.

RSVP volunteers will also be diversely recruited through volunteer matching websites, such as Volunteer Match.com, local media, radio and newspaper recruiting ads. Catholic Charities will utilize its own website ([www.ccaosa.org](http://www.ccaosa.org)) and newsletter (printed five times a year through Today's Catholic newspaper, which has a readership of 52,000) to reach potential volunteers by including ads, articles, announcements, and volunteer recognition features. Catholic Charities will also utilize its Facebook page for recruitment of RSVP volunteers and will soon be moving toward using Twitter and LinkedIn

## Narratives

as recruitment tools to reach social media-savvy individuals.

Veterans and military family members as RSVP volunteers: We currently know, according to the 2011 US Census Bureau, that Texas veterans make up of 9% of the state's population and San Antonio/Bexar County has 3% of the population being veterans. Of that 3% of San Antonio veterans, 62% is 55 and older and this will be reflected in RSVP volunteer community. In 2012, our records indicated that 29 of San Antonio and Val Verde RSVP volunteers were veterans. RSVP conducts recruitment efforts at the local military bases in San Antonio, local VFWs and American Legions halls. RSVP Volunteer recruitment efforts are also extended to the surrounding areas in Val Verde County.

RSVP volunteers with disabilities: RSVP volunteers are able to perform their duties at accessible sites. All RSVP stations are geared to accommodate persons with disabilities and it is understood via MOU to provide reasonable accommodations to allow persons with disabilities to participate in program activities. In an effort to ensure that volunteer stations are accessible to persons with disabilities, staff conducts a site inspection and overview of all facilities where volunteers will be performing duties. This is done in accordance with the ADA requirements for physical disabilities in accordance to the U.S. government specified regulations and guidelines. When placing a volunteer, staff will take into consideration the volunteer's interests, abilities and location of residence, along with utilizing their skills and potential in the best interest of the program.

Your plan and infrastructure to retain and recognize the RSVP volunteers: Catholic Charities RSVP knows that recognition is an important element in building self-esteem and life satisfaction. Like everyone else, older individuals enjoy being noticed for their good work and frequent commendations (ribbons, certificates, plaques, etc.) that are an integral part of the program.

Volunteers will be recognized at the annual volunteer recognition luncheon, where top performing volunteers are formally recognized. In addition to the luncheon, RSVP volunteers are further recognized for their efforts. Volunteers receive recognition certificates for a variety of service categories, such as most hours served certificates, oldest volunteer serving and most years in service. Service year award pins are also given out along with volunteer marketing items. Efforts like these, reinforced by birthday cards and holiday greetings, keep the volunteers feeling they are special and appreciated and that their contributions make a difference. These efforts helps them remain involved and for this reason it is not uncommon to find volunteers who have given over 10 years of service to the program. In addition, the placement sites are encouraged to also recognize their volunteers and thank them for their generous contributions.

Volunteers are also recognized on a regular basis through a quarterly RSVP newsletter, which is

## **Narratives**

mailed to all current volunteers. In addition to recognizing volunteers and acknowledging their birthdays, we also list new placement opportunities, giving volunteers options regarding their volunteer commitment and encouraging them to recruit their friends. Volunteers are also highlighted in the Catholic Charities newsletter.

Every effort will be made to ensure the satisfaction of current members and partnering agencies. However, in the event of attrition, RSVP will work closely with active volunteers to address concerns and develop new incentives for members. Recruitment and retainment is also addressed through the quarterly distribution RSVP newsletter. We also retain volunteers by providing volunteer meal and/or mileage reimbursements, inviting them to local events, and by continuous recognition of their efforts.

Every year, Catholic Charities RSVP hosts a community event, Senior Fiesta, where four outstanding volunteers will be recognized as the annual Senior Fiesta King, Queen, Princess and Duchess of the event. These volunteers will be nominated by their station supervisor and peers (with the final selection made by RSVP staff. RSVP staff will also attend local events geared towards seniors such as health fairs and cultural expositions to distribute information about the program. RSVP members will also be constantly encouraged to invite friends and family to enroll in the program and will be given small verbal recognition and tokens of appreciation on an ongoing basis as appropriate.

### **Program Management**

Plan/infrastructure to ensure management of volunteer stations in compliance with RSVP program regulations, such as preventing or identifying prohibited activities: Partner organizations are carefully selected by staff based on the need for volunteers in the community and by the desire from volunteers for the resources that RSVP has to offer. Once initial contact with the station has been made, a staff member will visit with the station volunteer supervisor to review our policies and procedures as well as discuss the benefits of partnering with RSVP. The station will then complete, sign, and turn in a Memorandum of Understanding (MOU) that outlines provisions of the partnership. After volunteers are placed at the new station or current volunteers submit required paperwork (RSVP membership application packet), a monthly timesheet will be signed by the volunteer and volunteer supervisor. These timesheets will be faxed, mailed, or emailed to the assigned staff volunteer coordinator. The coordinator will then calculate the volunteer's hours and enter them into the volunteer database. Staff will periodically make phone calls to, send emails to, and conduct site visits with the stations to maintain a relationship with the volunteers and station supervisor as well as inform them of any updates, policy and procedure changes, or upcoming events. All new RSVP volunteers will receive an RSVP handbook.

## Narratives

Plan/infrastructure to develop and/or oversee volunteer stations to ensure that volunteers are performing their assigned service activities: San Antonio RSVP operates according to well-defined procedures for evaluation and outcomes measurement. Volunteer stations are overseen by RSVP program coordinators and volunteer supervisor. RSVP coordinators perform regular visits to the various sites volunteers are placed at in order to confirm activities are being conducted according to the programs outlines. Volunteers are reviewed and offered informational support from RSVP staff during volunteer activities. Coordinators will have direct contact with site liaisons at each and every site in which RSVP volunteers perform services. The relationship between the community site liaison and the RSVP coordinator will help ensure effective oversight and strengthen the community partnership. Site liaisons will also provide RSVP with sign-in logs and the effectiveness of the site duties being performed by RSVP volunteers; for example, progress reports on the children being mentored via report card grades. Activities conducted by volunteers will be noted on the sign-in logs as well.

RSVP volunteers must complete monthly timesheets which are turned in at the end of each month. RSVP coordinators will calculate the total number of hours that each volunteer serves (in accordance with the sign-in logs from their volunteer sites) for that month and enters the hours into the volunteer reporting database. Additional performance measures, such as surveys and reports, are also consistently used to measure impact and are periodically taken throughout the year. RSVP staff is responsible for managing all of the information and data pertaining to the volunteers and is overseen by the director of RSVP. The staff maintains a data base that tracks vital volunteer information such as hours, and volunteer activities at the stations and the director of the program oversees all activities and responsibilities conducted by staff to ensure effect record keeping and data management.

Plan/infrastructure to meet changing community needs to include minimizing disruption to current volunteers as applicable and/or graduating stations as necessary: RSVP will aggressively recruit both stations and volunteers in areas of the primary and other focus areas in an effort to grow the program and strengthen the numbers in support of the new performance measures. Factors appraised include Programming for Impact and performance measurement; accomplishment/outcome reporting; volunteer and station recruitment, selection, management; resource development; and project management.

A thorough assessment will be done on existing stations to determine those that will continue to meet the new performance measures. Every effort will be made to retain volunteers wishing to allocate their time to the program in support of the new measures. RSVP will continue to implement

## Narratives

efforts to not only meet crucial community needs but to meet the needs of the volunteers as well.

Graduating stations will be notified of the coming changes after award notification has been received by Catholic Charities but prior to the new performance measures taking place. Written notification will be sent out to the volunteers of the graduating stations once the stations have been notified. RSVP will collaborate with the stations to offer all willing volunteers the opportunity to continue to serve within the new performance measures at stations in support of the new performance measures.

Organization's track record in the Primary Focus Area, to include, if applicable, measuring performance in the Primary Focus Area: Catholic Charities, Archdiocese of San Antonio, Inc. has a history of more than 72 years experience in serving families and youth. Since 1941, youth services have included parenting education through a variety of parenting programs within the agency; tutoring programs for at-risk and low-income youth at our Guadalupe Community Center location; ESL and other language classes for refugee youth through our School Impact and ESL programs within Refugee Services; and mentoring programs through our Foster Grandparent Program. Throughout the years, Catholic Charities has maintained a consistent effort to provide for the most vulnerable among us and providing for at-risk and low-income youth has been one of our focuses. With RSVP's Primary Focus Area being Education, our agency is well connected in the community with schools, community programs and a variety of locations to partner with in providing tutoring/mentoring to youth and engaging our volunteers in meaningful work.

Guadalupe Community Center, a program of Catholic Charities, has successfully operated a youth program since the 1940s. In recent years, the After School & Summer Youth Program has been focusing on academic success. Children successfully completed homework and grades consistently showed progress throughout the school year. Children were supported throughout their time in the program by the staff, who served as some of the only positive role models in the children's lives. With the positive influence from the After School & Summer Program, students' grades, attendance, and attitude at school showed improvement. Over the last few years, the program held about a 95% retention rate from school year to school year, and 98% of the students were promoted to the next grade level.

Catholic Charities began operating the School Impact Program (SIP) since 2010 with funding from a State grant to provide supportive services and after-school tutoring for eligible refugee students. SIP is a supplemental component of our refugee resettlement program that raises awareness about specific education needs of refugee children. Prior to their arrival to America, many refugee

## **Narratives**

students have had little to no formal education in their country of origin. As a result, they are at high risk of academic failure and are in need of all available help. For the past three years, Catholic Charities has been successful at helping students assimilate into American life by establishing a routine after school, work on their English, and provide the necessary support for parents in order to understand the American school system.

Through the Foster Grandparent Program, Catholic Charities has been mentoring and tutoring children with special needs for the past 10 years. For several years we provided mentoring and tutoring assistance in the public school system, and in 2010, we began working with the Catholic school system of the San Antonio Archdiocese. Most recently, we have partnered with United Way of San Antonio & Bexar County to provide literacy education assistance in San Antonio's Eastside elementary schools where we are working with San Antonio Youth Literacy, which will be an RSVP volunteer station under the new performance measures.

Plan/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: The advisory council assists the RSVP director to offer socialization opportunities to keep seniors active in meaningful volunteer activities to help them maintain positive self-esteem and self-image, ultimately resulting in the preservation of their well-being. San Antonio RSVP wants to ensure that the quality of each volunteer's life will be enhanced as they engage themselves in meaningful work and see the results of the service they provide the community.

Partner organizations are carefully selected by staff based on the need for volunteers in the community and by the desire from volunteers for the resources that RSVP has to offer. Once initial contact with the station has been made, a RSVP staff will visit with the station volunteer supervisor to review our policies and procedures as well as discuss the benefits of partnering with RSVP. The station will then complete, sign, and turn in a Memorandum of Understanding (MOU) that outlines provisions of the partnership. After volunteers are placed at the new station or current volunteers submit required paperwork (RSVP membership application packet), a monthly timesheet will be signed by the volunteer and volunteer supervisor. These timesheets will be faxed, mailed, or emailed to the assigned staff volunteer coordinator. The coordinator will then calculate the volunteer's hours and enter them into the volunteer database. Staff will periodically make phone calls to, send emails to, and conduct site visits with the stations to maintain a relationship with the volunteers and station supervisor as well as inform them of any updates, policy and procedure changes, or upcoming events.

## **Narratives**

Volunteer eligibility is determined by age, desire and ability to serve in available/existing stations and upon the program receiving a cleared background check on each new volunteer. Volunteers will be accommodated for disabilities according to accessibility at available stations and the duties they choose to perform for the program.

### **Organizational Capability**

Plan/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: Catholic Charities has an established system of effective programmatic and fiscal oversight for financial and in-kind requirements. The program director is responsible for deciding how resources are used based on the program's need and predetermined allocation of funds. All expenditures for the program must be approved by Catholic Charities program director, president/CEO, and CFO or assistant CFO. The finance department accounts for RSVP's resources to ensure accountability and effective use of these resources and tracks all funds and donations dedicated to supporting RSVP through financial reports. The financial reports are retained for a minimum of seven years following the final financial status report.

Additionally, program directors and the Catholic Charities Board of Directors review the program components monthly through internal program reports and reports to the board to ensure efficiency and that the programs are on target with funding, projections, and outcomes. Additionally, the board holds a strategic planning meeting once a year to review the agency direction and program components more thoroughly. The RSVP director, staff, and advisory council will implement an annual project self-assessment checklist to identify strengths, accomplishments and weaknesses of the program. Factors appraised include programming or impact and performance measurement; accomplishment/outcome reporting; volunteer and station recruitment, selection, and management; resource development; and project management. Participants then develop a strategic plan to strengthen the program to not only meet crucial community needs but to meet the needs of the volunteers.

Catholic Charities has the ability to secure and make the best use of available community resources for all of its programs, including RSVP. The Archdiocese of San Antonio contributes too many of Catholic Charities programs including RSVP in Val Verde County. In addition to federal funds from the Corporation for National and Community Service (CNCS), San Antonio RSVP also receives CNCS state funds to service Val Verde County. San Antonio RSVP also receives funds annually from the City

## Narratives

of San Antonio.

Catholic Charities has the ability to secure community resources for all of its programs, including RSVP. Additionally, Catholic Charities receives a significant amount of community support through independent donations, and the agency holds several fundraisers each year. The Catholic Charities development department is charged with seeking opportunities for contributions for the San Antonio RSVP as it is with all agency programs. The development department does this by garnering support through its website, quarterly newsletter, grant opportunities, newspaper articles, and annual direct mail appeal. Funds for the project are also raised through fundraising efforts implemented by the advisory council, including the council's participation in soliciting donations and sponsors for Senior Fiesta. Senior Fiesta also provides an opportunity for trades. These trades are developed through mutually beneficial relationships with the media and local and national corporations. Junior League of San Antonio provides in-kind donations in the form of volunteers so that our volunteers may enjoy our events and funds to assist with initial out-of-pocket expenses.

Clearly defined staff positions, identification of current staff assigned to the project and how these positions will ensure the accomplishment of the program objectives: San Antonio RSVP has one full-time program director and three outreach & community coordinators that service the San Antonio area. The program director is responsible for directing and managing RSVP personnel in Bexar County, allocating and reporting on program funds, ensuring grant compliance, encouraging the growth of RSVP through volunteerism and community partnerships, assessing community needs, integrating Programming for Impact and performance measures into program development, maintaining contact with stations, and managing the advisory council.

The outreach & community coordinators are responsible for volunteer recruitment, placement, training, and tracking. Responding to community needs through station development and support through volunteer placement, coordinators meet with potential community partners, organize special events, and provide volunteer and program supportive services.

The program director, Martie Boman, has served on a State level with the Texas Workers Compensation Program and Federal level with the United States Department of Labor. Prior to accepting the RSVP program director position, she served for approximately three years in Catholic Charities Refugee Services program as a the coordinator for the Refugee Services School Impact Program (a program of Health & Human Services Commission). She has worked as the San Antonio RSVP program director since September 2012.

The first outreach & community coordinator, Araceli Castillo, is a graduate of Our Lady of the

## Narratives

Lake University with a Bachelor of Arts in Spanish with a minor in accounting. She has been with San Antonio RSVP since August of 2012. She has proven to be an asset as a coordinator, displaying her abilities in volunteer recruitment, training, retention, and outreach to nonprofit organizations. Her previous experience includes accounting, budgeting, automated reports, project tracking and overall center support, skills that are important in tracking of volunteers and producing reports for the program.

The second outreach & community coordinator, Mary Beth Cieslak, is a graduate of University of Texas Health Science Center in Houston, San Antonio Campus, with a master's in public health. She also holds a bachelor's degree in arts. Her previous experience consisted of various internships. The third outreach & community coordinator, Zelina Cruz, is a graduate of Baylor University with a bachelor's degree in Latin American studies. Her prior work experience spanned with the Girls and Boys club, Girls, Inc. of San Antonio, and Edgewood ISD.

The program director will ensure the program is in compliance with the terms and conditions of the Federal grant and other funding sources. The director is responsible for training and supervising staff, monitoring staff performance, maintaining work schedules, reviewing financial statement, preparing annual budgets, developing and implementing policies and generating required reports. The director also works with clients, staff, and community groups to support resource development of public relations and communications in the community by providing informational programs to interested groups. The directors provides outreach and volunteer recruitment/retention support. The director also reviews financial statements, preparing annual budgets, developing and implementing policies and generating required reports. She maintains professional knowledge and skills by attending relevant workshops, training and conferences.

The outreach & community coordinators will travel throughout Bexar and Val Verde counties serving stations in support of the new performance measures. These visits will help ensure that stations and volunteers are performing services in accordance with the new measures. Coordinators will also participate in supporting recruitment efforts to help continue the growth of RSVP. Coordinators hold new volunteer orientations covering complete and correct submission of enrollment forms. Timesheets, reimbursements forms, and explains volunteer benefits. Coordinators ensure volunteer assignments are consistent with the interest and abilities of the volunteers as well as the needs of the community and the requirements of the RSVP Federal/State grants. Coordinators perform Volunteer Reporter system status updates of volunteer or station information. They create and provide reports as needed or requested in support of RSVP. Coordinators assist the RSVP director

## Narratives

in planning and implementing volunteer recognition events. Coordinators develop/implement and attend relevant community outreach and network opportunities. Coordinators assist in preparing the RSVP quarterly newsletter, new articles, media, and promotional materials for the director's approval.

Additionally, the RSVP staff attends at least two local workshops and conferences per year. These workshops and conferences focus on volunteer recruitment, volunteer management, and various social disparities that plague the elderly population. Staff coordinators attend San Antonio Volunteer Association meetings, a support networking exclusively for volunteer management staff. RSVP staff members also receive training through CNC's Resource Center. RSVP staff also accesses technical assistance through webinars and Catholic Charities' IT department.

Capacity to develop and implement internal policies and operating procedures to provide governance and manage risk, such as accounting, personnel management, and purchasing: Catholic Charities has an established management tier comprised of a board of directors, president/CEO, senior management staff, program management staff (program directors), and program staff. The president/CEO of Catholic Charities reports to the board of directors.

The board of directors has 10 regularly scheduled meetings per year, which includes a strategic planning session each September. At the annual strategic planning sessions, the president/CEO presents to all board members details of the progress of the agency and its programs. Programmatic goals as well as goals for growth are established at the strategic planning sessions and are revisited at monthly board meetings. Each program director reports on a quarterly basis to the board regarding program activity and progress through written reports. The reports are reviewed at the monthly board meetings. The senior management staff operates under the direction of the President/CEO. Senior management staff includes: vice president of program operations, director of human services, chief financial officer, director of development, director of information technologies, deputy director of senior services, and deputy director of children and family services.

Catholic Charities implements internal policies and operating procedures to provide governance and manage risk by adhering to personnel policies and procedures manual, overseen by the director of human resources, and a fiscal management procedures manual, overseen by the chief financial officer (a CPA). The human resources director, along with the president/CEO and vice president, is responsible for clearly defining roles of staff and administrators. Agency personnel policies and procedures are proposed by senior management, and approved and amended by the board of directors. Included in this manual are detailed protocol regarding internal policies such as sick/annual leave,

## Narratives

overtime, benefits, dress code, travel, evaluations, job performance, grievance procedures, etc.

The fiscal management procedures manual addresses the following accounting and purchasing matters: agency structure and administration, financial reporting, and separation of duties; receipts (generation and collection, receivables, acceptance and use of cash & non-cash donations); cash disbursements & procurement (authorization for payment, payroll, procurement schedule, approved vendors, petty cash); fixed assets (acquisitions, dispositions, asset records); travel; cost allocation plan; bank reconciliation (preparation, outstanding check procedures); program budgets; grant reporting; budgeting; annual audit; record retention; and investments.

The board of directors reviews and approves monthly and year-to-date financial statements as well as the current year's budget and yearly audit. The finance committee of the board is made up of CPA's and other financially competent individuals (accountants and other business professionals from the community) who have the qualifications necessary for financial oversight of the agency. The finance committee meets monthly with the CFO and the President/CEO to review the financial statements and discuss the agency's financial status. The chair of the board, who is also a finance committee member, reports the financial status at each board meeting.

Program management staff must report to a designated member of senior management. Program staff must report to program management staff. The president/CEO must approve all internal policies, including a travel policy. Senior management and program directors are responsible for implementing these policies, and the vice president of program operations oversees them.

Capacity to manage capital assets such as facilities, equipment, and supplies: Catholic Charities ensures that proper care, maintenance, control, and reasonable safeguards are in place to prevent loss, damage or theft of capital/fixed assets. Catholic Charities tracks the location, quantity, condition, maintenance, and depreciation status of these assets. We track our equipment with asset tags and track supplies and equipment based on the funding source. We are monitored by a number of federal agencies without any disallowed costs for any of these items.

The management of capital/fixed assets is overseen by the chief financial officer and implemented by several levels of management staff within the agency (including program directors, department directors, and the IT director) to ensure that fixed assets are used for business purposes and in accordance with agency policy. The management of fixed assets includes but is not limited to: following proper procurement procedures for purchasing assets and ensuring the items ordered are actually received and in good working order; following proper procedures for the disposal of fixed assets; timely reporting of asset loss; and controlling and authorizing all equipment used by

## Narratives

employees.

Organizational infrastructure in the areas of robust financial management capacity and systems and past experience in managing federal grants: Serving as a member of one of the largest social service systems in the United States, Catholic Charities receives funding from federal, state, county, city, and local sources for many of its 27 programs. Multiple programs are funded through United Way, and the Archdiocese of San Antonio contributes to all programs of the agency. Catholic Charities has been operating under federal grants for several decades and currently maintains 16 federal grants totaling \$5,547,654 with: Department of Health & Human Services; Federal Emergency Management Agency; Internal Revenue Service; U.S. Department of Stat, Bureau of Population, Refugees and Migration; and the Corporation for National & Community Service.

Catholic Charities' CFO, Lori Franckowiak, a CPA and certified fraud examiner, is directly responsible for the agency's fiscal management under direct supervision of the president/CEO. Franckowiak currently has two years of experience working with Catholic Charities and has 18 years of public accounting experience as an external auditor who specialized in nonprofit organizations who received federal funding. She assisted organizations in internal controls necessary to be in compliance with grant funding. She earned a Bachelor of Science in accounting from Mississippi University for Women. She is a member of the American Institute of Certified Public Accountants, Texas Society of Certified Public Accountants, San Antonio Chapter of Certified Public Accountants, and Association of Certified Fraud Examiners.

With a current organizational budget of more than \$11 million, Catholic Charities employs a financial management system that ensures prudent oversight and management of federal grant dollars, including established operating and finance policies, processes, and protocols that support efficient program and grants management. The agency's financial system includes fund accounting to ensure appropriate management of resources from diverse funding streams and established protocols for effective oversight of all collaborative initiatives. According to Catholic Charities' most current audit, 43% of its more than \$11 million dollar budget for FY12 was federal funding.

### Other

N/A

### PNS Amendment (if applicable)

N/A