

# Narratives

## Executive Summary

Mesa County RSVP's goal is that by the end of this three-year Federal grant cycle (April 1, 2015 to March 30, 2018) an estimated 560 active RSVP volunteers will be serving in the Mesa County community on a regular basis. The CNCS federal investment of \$68,627 will be supplemented by approximately \$200,000 in additional funding from fundraising, grant writing and individual donations.

Our Primary Focus Area is Healthy Futures. The organization has chosen our volunteer's Primary Focus Measure activities to include distributing health information, coaching clients in Medicare issues, delivering food to people's homes, providing emergency food to those in need and providing transportation to health care appointments.

At the end of the three-year grant period, our planned outcomes are 3,000 individuals with disabilities having increased social support by receive home delivered meals; 100 clients receive rides to and from medical appointments and having increased social support; and 3,000 individuals who report increased food security because of food bank/pantry support; 1,140 K-12 school children will experience improved academic engagement because of our Senior Scholar Project volunteer tutors; and five organizations will implement effective volunteer management practices.

## Strengthening Communities

According to the Mesa County Government website, the county is 3,328.97 square miles, much of which the US Forest Service and the Bureau of Land Management own and control.

Grand Junction is the largest city in Mesa County and in all of Western Colorado and it is the medical hub between Denver and Salt Lake City, Utah. Grand Junction is home to a number of light manufacturing and service industries, oil and gas industries, a regional airport, and a number of recreational opportunities. The part of Mesa County where Palisade, Grand Junction, Fruita and Loma are located is frequently referred to as the Grand Valley and has a wide variety of agricultural produce. The area weather is ideal for growing peaches and grapes and is known for the fruit and many local wineries. Most years, Mesa County residents enjoy mild winter temperatures with lows averaging only 14o in January and having low humidity year round.

The county is located on the western border of Colorado 30 miles from Utah. Mesa County is comprised of a river valley surrounded by contrasting natural landmarks such as the Colorado National Monument and the Grand Mesa National Forest. The Colorado National Monument is a beautiful geological display of towering red sandstone monoliths set against deep, sheer-walled

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canyons throughout a 20,000-acre park. The Grand Mesa National Forest (the Mesa) is the largest flat-topped mountain in the world and has over 200 lakes. An April 2011 New York Times article, which got its data from Sperling's Best Places about "Where to Live to Avoid a Natural Disaster," ranks Grand Junction, CO, the fifth safest place in the USA.

Mesa County School District 51 is the largest employer in the county and provides the majority of primary K-12 educational opportunities, including the Career Center. Secondary educational opportunities include Colorado Mesa University which provides a range of educational options including the division called Western Colorado Community College that offers higher education instruction for academic transfer programs, career technical programs, and a variety of certificate programs. CO Christian University provides an additional secondary education opportunity. There are other educational institutions including IntelliTec College and the Salon Professional Academy. This is a community with four hospitals. St. Mary's Medical Center is the largest hospital on the Western Slope of Colorado. Community Hospital and Family Health West are smaller hospitals, and the VA Medical Center is part of the Department of Veteran's Affairs. There are 59 nonprofits listed in Mesa County through GuideStar. This community is well known for the way nonprofit organizations collaborate with one another.

Mesa County RSVP, Inc. has chosen Healthy Futures as our Primary Focus Area. Mesa County's population numbers show that 29.7 percent (40,981 people) are age 55 or older and more than 8,000 of those are disabled. Mesa County is a huge retirement community. Healthy Futures focuses on people getting improved access to health care. In 2008, when we began our Senior Health Insurance Assistance Project (SHIP), we had 194 client contacts. Over the past six years, we have had a total of 6,981 client contacts. The SHIP client surveys ask them to rank on a scale of 1-10 (with 10 being the most confused about Medicare) how confused they were when they came in the first time and how confused they were when they left. There is a significant average five-point drop in the level of confusion about Medicare by the clients we have helped through our SHIP Project.

With almost 30 percent of this community's population being age 55 or older, the need for senior independent living services is very high. The fact that there are agencies in our community that provide different types of health education, food delivery support, emergency food banks/pantries, medical transportation, home repair services, etc. demonstrates that these needs are prevalent in our community.

Through Mesa County RSVP we have our Senior Health Insurance Assistance Project (SHIP) that helps Medicare-eligible individuals understand and gain better access to their health care benefits, and

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also provides them unbiased information about their insurance to help them solve any issues they may have with Medicare. The SHIP Project will be measured under Output Measure H4. We also work with nine stations that help educate the public by distributing health information either through the distribution of brochures, seminars, classes or one-on-one assistance. The SHIP project and the stations delivering health information, will improve access to primary and preventative health care. The stations distributing health information will be measured under Output Measure H2.

Clients of all ages will receive food delivery through local food programs, individuals will receive food from local food banks and pantries to help them through Output Measure H10, thus increasing the number of individuals receiving emergency food. Through Output Measure H8, transportation to medical appointments will be provided the elderly, ill or disabled and food delivery will provided to home-bound or older adults and individuals with disabilities by a local food program and stations that provide these services. All of these measures will provide help to meet health needs, provide increased social support and help these clients live more independently in their own homes.

The methods we plan to use to measure, collect and manage data and ensure that the National Performance Measure are tracked are a combination of surveys, databases, activity logs, sign-in sheets, client contact sheets, etc. For example, we will utilize Constant Contact web-based software to create a station survey to track the number of clients receiving health information from the stations. We will use completed SHIP client contact sheets with the data entered into the SHIPtalk database to measure the number of client contacts and unduplicated clients who receive Medicare coaching. An activity log and client database will be used by the station to track the number of clients who receive home delivered meals. An activity log will be used to track the number of patient medical appointment rides that are provided and the number of unduplicated clients receiving these rides. A database will be used for local food banks to track the number of clients receiving emergency food. Completed Handyman client work order forms, our Handyman database, and client survey data will show how many clients received home repair services and the benefits they derived from that service. Client sign in sheets and a database will be used to track the number of economically disadvantaged individuals who received financial literacy help through VITA. Teacher and tutor survey documents and survey database will be used to analyze the responses and to track the number of students who participate in CNCS supported school tutoring. Volunteer time sheets show the number of board members who assist in developing more effective volunteer management techniques; volunteer sign-in sheets show the number of volunteers helping leverage in-kind resources, and an annual report will show the amount of money the sale of those in-kind goods raised and what agencies they helped. The

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Volunteer Reporter database tracks the number of volunteers, hours of service and stations active in other Community Priorities. Volunteer time sheets turned in and input into our Volunteer Reporter database show the number of volunteers and hours provided in disaster response duties.

We have several volunteers in other community priorities who help at the information desk at the local VA Medical Center; however those volunteer positions do not fit the federal work plan requirements.

### **Recruitment and Development**

Here is our plan and infrastructure to create high quality volunteer assignments with opportunities such as sharing volunteer experiences, abilities, and skills to improve their communities and themselves through service in their communities. We plan to ask each station to send us new job descriptions for each volunteer position where we currently have volunteers placed and for any positions for which they are seeking RSVP volunteer assistance. We are updating the Volunteer Request Form we send to our stations. This form will require the station representative to provide more detailed information about the population the station is serving, how the volunteer's service will impact that population, how the volunteer's experiences, abilities and skills will help improve the community they serve, and what tracking mechanisms they use for obtaining data on their volunteers' activities. The infrastructure we use is our Volunteer Reporter database where we input all volunteer job description data and the number of volunteers required for a particular job. We also input the volunteer hours for these jobs into this same database. The Volunteer Reporter database can provide many different filtering options, types of reports, etc.

In order to ensure RSVP volunteers receive the training needed to be a highly effective means to addressing identified community need(s) in both the Primary Focus Area and in Other Focus Areas or Capacity Building we have developed this plan. Each job description will provide information from the stations about the training they will provide to the RSVP volunteers in order to be able to do their jobs correctly. We have requirements set for the stations regarding training provided to our RSVP volunteers. For example, the RSVP Member Agency Handbook, which goes to every station says, "Training gives the volunteer the information necessary to do the job. Time needs to be set aside to provide the necessary training to assure the volunteer knows what to do. This may take extra time at the start, but will pay off in the long run."

Our Memorandum of Understanding (MOU) between RSVP and the stations states, "The Volunteer Member Agency will implement orientation, in-service instruction or special training of volunteers." Our plan is that the Volunteer Manager will do a follow-up contact to see if the volunteer is satisfied

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with their placement and find out if they have received adequate training in order to be effective in their position.

The demographics of our community and our plans to recruit a volunteer pool reflective of the community served are as follows. The population of Mesa County is estimated at 146,562. The median age is 38.1 years old. The labor force is 76,419 people as of June 2014, The median household income for Mesa County is estimated at \$51,029. The county is evenly divided between male and female populations (Male 49.08%, Female 50.2%). The racial diversity of Mesa County's population is approximately 80.6 % Caucasian, 13.7% Hispanic, 0.9% African American, 1.6% American Indian or Alaska Native, 1% Asian, 0.1% Native Hawaiian and Pacific Islander and 2.2% two or more races. The percentage of the population of Mesa County that is our target demographic for recruiting volunteers age 55 or older, is 27.9% or 40,981.

The second highest percentage of people in our community who are identified through the 2010 US Census is classified as Hispanic. We are members of the Western Colorado Latino Chamber of Commerce (WCLCC). Our Volunteer Manager attends the Chamber After-Hours Events in order to network with Hispanic community and business leaders. Our job descriptions will ask for any need a station might have for Spanish speaking volunteers. We also have our program brochures translated into Spanish for distribution to that part of our community.

There are 52 active RSVP volunteers who are also veterans. They are active in many different areas of service.

Our plans to retain and recognize RSVP volunteers are as follows: After receiving a completed volunteer membership application, the new volunteer is scheduled for an initial interview and orientation with the RSVP Volunteer Manager. At that interview, the Volunteer Manager will seek to find out specifically what the new volunteer most wants to do to help our community. If the volunteer is unsure, the interview can focus on the individual's interests, skills and abilities, and the Volunteer Manager can then suggest possible volunteer positions until a placement(s) can be determined.

After the interview is concluded, the Volunteer Manager will contact the volunteer supervisor at one of our Signature Projects or stations to inform them about the new volunteer's desire to help with the work outlined in the job description. After placement in a position, the Volunteer Manager will do a follow-up contact to see if the volunteer is satisfied with their placement and to assure they are reporting their volunteer hours to RSVP. This helps to validate that the volunteer is satisfied with their placement and helps us to retain the volunteer.

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There are several benefits provided to all registered RSVP volunteers. We have free volunteer insurance that includes personal liability, accident insurance and additional automobile liability insurance. We host three events each year to help retain and recognize our volunteers. In March, we have our large Annual Volunteer Appreciation Event. This event recognizes our volunteers for all of their years of service, but more specifically for milestones like 5, 10, 15, 20 years and higher. We have entertainment, good food, social interaction, door prizes and fun! In the summer, we have an Ice Cream Social event designed to give our volunteers an opportunity to socialize with other volunteers and to bring others with them who may be interested in joining our organization. During the holidays we have a pot-luck luncheon to honor our volunteers and provide an opportunity for socialization around what, for some individuals, can be a lonely time a year.

We create a quarterly newsletter that is distributed either electronically or in paper form to inform our volunteers about upcoming RSVP or community events of interest to them. We also provide five educational seminars free to all RSVP volunteers during the year. These seminars are on topics of interest to our demographic and provide them an additional benefit for being a member of RSVP. We have a mileage reimbursement program that provides a check every quarter to volunteers who apply and are approved to receive this benefit. The purpose for this program is to help people who cannot afford to volunteer unless the cost of driving to-and-from their volunteer position was partially covered.

We have also developed a very user-friendly website through which a volunteer can join RSVP, find out what volunteer opportunities are available, and report their volunteer hours. A volunteer can also download brochures, Annual Reports, fliers, time sheets, etc. It is a useful tool to inform and assist our volunteers and ease the time sheet requirement.

### **Program Management**

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Program Management:

These are our specific plans and a strategy for overall management of the RSVP project proposed, and outlines our plan and infrastructure to ensure management of volunteer stations in compliance with RSVP program regulations. When an organization is interested in becoming a station with us they can be directed to the "Agency Forms" page on our Website or the Volunteer Manager can email or mail the following documents to the agency. The documents available are the "New Agency Inquiry Letter," the "Member Agency Application" and the "Member Agency Handbook." Each agency is required to complete the "Member Agency Application" in order to start the process. They have to be approved before any volunteers can be assigned to the station. This application asks the agency if they have 501(c)3 status, are a Duly Licensed Proprietary Health Care Facility or are a Governmental Public Agency. The application also asks the agency what the volunteers will be asked to do if they are placed there. This helps us screen the agencies for prohibited activities or jobs that our volunteers would not find appealing. In addition, we screen for the types of agencies and jobs for which we will commit to recruiting volunteers, to ensure that all of our jobs and volunteers are correctly placed into work plans and performance measures. If a station/agency is denied Member Agency status with our organization, the Executive director contacts the agency representative and informs them why they were not approved.

After the application has been reviewed, fits within our guidelines and is approved by the Director, the application is given back to the Volunteer Manager, who then sends them a "New Member Agency Acceptance Letter" and standard MOU covering all the requirements outlined in our "RSVP Handbook." The MOU is sent to the station to be reviewed and signed and sent back to us. Along with the MOU a "Disability Accessibility Self-Evaluation Certification Form" is sent to the station to be completed and returned.

After the MOU and the completed accessibility form are returned, the MOU is signed by the Program Director and given to the Volunteer Manager to be processed and filed in the agency station file. After the station is approved, the Volunteer Manager schedules a site visit with them. At this visit the

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"Member Agency Handbook" is reviewed and the station volunteer coordinator is oriented in the proper use of the "Volunteer Request Form." In addition, a safety check is performed by the Volunteer Manager to make sure the volunteers are working in a safe environment. The Member Agency Safety Checklist" and "Member Agency Site Visit Form" are both completed by the Volunteer Manager after the site visit ends. All of these documents are filed in the Station File for that agency. When the properly completed MOU and "Disability Accessibility Self-Evaluation Certification forms are received, the Volunteer Manager begins the "Activating a Member Agency Process," which includes creating a physical station file folder and entering the agency information into our Volunteer Reporter Database program. There is a field in the database for the date the MOU is signed, and that date is entered along with all of the other information. New station MOUs are renewed every year. Eventually, if the station is a good fit and they meet all of the requirements, the MOU will be reviewed on a three-year cycle. The Volunteer Reporter Database has a report that is run monthly by the Volunteer Manager providing a list of any stations whose MOU is up for renewal. Those stations that need an updated MOU are sent the document for signature and volunteer placements are reviewed at that time.

The following is our plan and infrastructure used to develop and/or oversee volunteer stations to ensure that volunteers are performing their assigned service activities. Our board of directors has taken on the responsibility of doing additional site visits with our other stations each year. When they visit, they will take along a "Site Visit Form" and a "Safety Checklist" in order to update our information. We update our records with the information they gather during the site visit. The Volunteer Manager also goes out and does site visits as well.

We regularly ask the stations to send us copies of most recent job descriptions they have, tell us whether or not our list of volunteers at the station is accurate and discuss their future needs for volunteers. This is done so we can more accurately decide which jobs fit in which performance measures.

All RSVP volunteers receive a "Volunteer Handbook" that outlines the process by which they may tell us if the volunteer job to which they have been assigned is something they are not enjoying. If not, we can pass that information on to the station and find a better fitting position for the volunteer. Also, if an agency is not happy with the RSVP volunteer's work, they can call us and we can partner with them both to find a solution to the issue. This leads to increased satisfaction for the volunteer and agency and increased volunteer and agency retention.

Now that we are in the process of implementing the new performance measures, we will do targeted

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volunteer recruitment and work more closely with the member agencies to make sure the volunteer positions continue to fit the parameters and that the station is being consistent with providing the data we need to calculate our outputs and outcomes.

The following is our plan to meet changing community needs and minimize disruption to current volunteers and to graduate stations if necessary. We have identified a primary placement for every volunteer and within what performance measure they fit. If the volunteers fall into the Other Community Priorities, over time they will be worked with to see if we can move them into a primary placement with one of our other focus areas. If our percentage is too high in the Other Community Priorities positions, we will continue to evaluate the jobs for graduating either volunteers or stations. Those stations, whose jobs only fall into the Other Community Priorities area will be graduated when we are no longer able to provide them volunteers.

Since this is our first grant in tracking volunteers and data in a Primary Focus Area we do not have much track record information. However, we have been working toward the RSVP 2.0 goal since we learned about it and have implemented the focus area information into our database. We have found that we do not have challenges filling the minimum requirement of 25% of our volunteers working within the Healthy Futures Primary Focus Area.

In order to ensure our project is in compliance with the RSVP federal regulations including ensuring RSVP volunteers are placed in stations that have signed the required MOU, and ensuring all volunteers are eligible to serve in RSVP we have developed the following plan. First, we do not have an RSVP Advisory Council. Since we are a self-sponsored RSVP, we have an RSVP Board of Directors acting in that capacity as well as fulfilling the other duties required to be a board. The board oversees the staff who report to them regarding the implementation of all federal regulations. They have helped develop our financial policies and regularly review them. All of our MOUs are checked on a monthly basis to see if they are up for renewal and are then processed for renewal as needed. We utilize our database to monitor our volunteers and their activities as an RSVP volunteer. They cannot turn in hours for any job that is not approved in our database. They cannot be a member of RSVP if they are not age 55 or older. And they need to be currently active and properly report their hours to continue as a member.

### **Organizational Capability**

We have in place a "Financial Policy Manual" and a "Federal Grant Management Guide" developed in conjunction with our board, accounting firm and Executive Director. These documents are attached to this grant, and outline in detail the infrastructure we have in place to provide sound programmatic

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and fiscal oversight and day-to-day operational support to ensure compliance with RSVP program requirements (statutes, regulations, and applicable OMB circulars) and to ensure accountability and efficient and effective use of available resources.

The following current staff positions are identified as staff assigned to the project and we have explained how these positions will ensure the accomplishment of our program objectives. July 1, 2015, RSVP will celebrate 42 years of service in Mesa County. Mesa County RSVP, Inc. has been a self-sponsored, incorporated RSVP since 1999. Our mission statement is "Serving the community by utilizing the talents and skills of senior volunteers and placing them in rewarding opportunities." The Board of Directors hires and supervises the Executive Director and oversees the management of Mesa County RSVP, Inc. The Key Staff people responsible for program management, with a listing of the background and experience of these staff members, are as follows:

Jean A. Brewer -- Executive Director: Ms. Brewer was hired by RSVP July 1, 1994, as the Administrative Assistant and Recruitment Manager. In July of 1998, RSVP promoted her to the position of Acting Director and then permanently hired her as the Program Director in November of that same year. Two years later when the organization incorporated as Mesa County RSVP, Inc., the board promoted her to the position of Executive Director (ED). Ms. Brewer has a Bachelor's of Business Administration degree with a double emphasis in Office Supervision and Management and Personnel Management. The ED's position is a full-time, exempt position.

Ms. Brewer, as The Executive Director for Mesa County RSVP, Inc. is responsible to the Board of Directors for directing and coordinating RSVP. This includes administrative and supervisory work in connection with RSVP, especially planning, coordination, assessment, and implementation of program components. The Director is responsible for working closely with community representatives and organizations to promote and foster a positive program image. The Director is evaluated six months after initial hire and annually thereafter by the Board of Directors. The Director is responsible for grant writing, fund raising and budget management.

Amber Hodges -- Office Manager: Ms. Hodges was hired by RSVP August 20, 2012, as a part-time Administrative Assistant. She has an AAS Degree in Business Administration and a BBA Degree in Finance, Economics and Management. She is also a veteran of the Gulf War, serving two years in the army from 2003 to 2005 as a Specialist in the 519 Military Police Battalion. Ms. Hodges worked for Habitat for Humanity as the Volunteer and Program Coordinator. On August 3, 2013, Ms. Hodges was promoted to the position of Office Manager.

As the Office Manager, Ms. Hodges plays a vital role in information management in our organization.

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She is the primary employee who manages data through Volunteer Reporter, our key database software program. She also facilitated our computer systems in conjunction with our IT company representatives. Without the vital oversight, attention to detail and skill with the database, the infrastructure necessary to track the variety of information we need to obtain to satisfy the grant requirements, would not be possible.

Ruth McCrea -- SHIP and Handyman Project Manager: Ms. McCrea was hired by RSVP November 14, 2007, as a part-time Volunteer Manager (20 hours per week). Ruth has a BA in Studio Art and Mass Communications and two years of prior experience working as the volunteer coordinator for the Counseling and Education Center as an AmeriCorps Volunteer. Ruth has managed the SHIP Project since Mesa County RSVP became a SHIP Affiliate in January of 2008. In August 2014 Ruth's job was changed from Volunteer Management and SHIP to SHIP and Handyman Project Manager. The SHIP & Handyman Project Manager position is a full-time exempt position.

In Ms. McCrea's position she is responsible for managing the volunteers, data base information, and clients, who are essential to both the SHIP and Handyman Projects. These two programs are vital to ensure the accomplishment of the program objectives for one Healthy Futures and one Economic Opportunity performance measure.

Diane Barger -- Volunteer Manager: Diane joined Mesa County RSVP, Inc. on August 25, 2014 as a full-time exempt employee. Diane joins RSVP with 20+ years of experience in volunteer management. Diane has a Bachelor's of Business Administration degree and received her CVA (Certified Volunteer Administrator) in 2010. Diane helped develop the RMHP Volunteer Time Bank and worked as the Volunteer Manager for HopeWest Hospice for many years.

Ms. Barger, as the Volunteer Manager, will be a key player in all of the organizations recruitment and management of our volunteers. She will be responsible for working with the stations, the volunteers, and doing the targeted recruitment necessary to meet our grant goals. She is responsible for volunteer recruitment for all programs and oversees the retention and management of the volunteers. She is also specifically responsible for managing the Senior Scholar Project which relates to all of our Education performance measures.

Adequate personnel policies and procedures are in place in our organization. There is an 'Employee Handbook' with written policies regarding employment issues, work time and compensation, holidays and leaves, benefits, and work rules. The Board of Directors establishes, reviews, updates, or changes the policies. Each employee receives this handbook when first hired, and is required to know what the policies are and to sign a statement that they have read and agree to abide by the policies. Each

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employee receives an annual employee evaluation. The Board conducts the evaluation of the ED, and the ED does the evaluations of all of the other employees. Each employee has a written job description that clearly defines duties. The ED and employee establish annual goals for each employee during the individual's employee evaluation.

The Executive Director (ED) is responsible for all financial management for Mesa County RSVP. In conjunction with the Budget and Finance Committee, the ED prepares budgets in the fall of the year prior to the beginning of the next fiscal year. Individual program budgets are prepared for each Signature Project within Mesa County RSVP -- such as RSVP, Senior Scholar, Handyman and SHIP - - with revenue and expenses detailed for each one. The revenue projections come from past experience, grants received, and any plans for new grants for the coming year. Each Signature Project has certain grants written specifically for it. The ED combines the project budgets into one for the organization as a whole. The Chair of the Budget Committee, the Treasurer, presents this combined budget to the Board of Directors for approval. After approval, the ED relies on this budget as the financial goal for writing grants. The fiscal year for Mesa County RSVP is July 1 through June 30.

All of our accounting data is kept on QuickBooks. The computer system automatically backs up all of the shared files daily to secure offsite storage. The ED is responsible for preparing all bank deposits of grant funds and donations and allocating the funds to the appropriate classifications. The Office Manager (OM) takes the deposits to the bank. Classifications are set up in QuickBooks for each special project and categorized further by revenue accounts such as Federal, United Way, restricted grants and specific foundation funds that require individualized accounting. Other income categories are set up in the chart of accounts for individual donations and fundraising proceeds. For any funds that do not require special documentation of expenditures, the money is kept in a general operating account for each project.

Several people are involved in the process of doing the accounts payables for purchases and for paying bills. The Executive Director receives regular bills and approves purchases within the guidelines and policies of the organization and in accordance with the budget. Approved payment request forms and billing documents are given to the bookkeeper from our accounting firm, Chadwick, Steinkirchner, Davis & Co. (CSD). The CSD bookkeeper prepares the payables and payroll twice a month -- two business days prior to the 15th and the end of each month. The ED and one of the assigned board members (Treasurer, President, or Vice President) reviews the payable requests, signs each check to approve them and are then distributed by mail. We have a few vendor accounts that are paid

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automatically online each month, and the bookkeeper enters them into QuickBooks.

We have five bank accounts for managing the organization's funds. We have an interest-bearing checking account (nick-named the New Money Market Account), where we deposit all of our funds as they come in. We have another account into which CNCS electronically deposits our Federal funds as we request them. We then transfer those funds to the New Money Market Account. We also have a checking account (the Main Checking Account) out of which we write all checks, another account for funds specifically allocated for our employee flexible benefit program (Flex Benefit Account) and an account set up for our raffle fundraisers (Raffle Account) as required by state law. We transfer funds electronically from the New Money Market Account to the Main Checking account twice a month to cover the accounts payable checks and as needed to maintain the proper balance for the Flexible Benefit Account. If an employee chooses to participate in the Flexible Benefit program, we withhold a designated amount of money from the employee's payroll check pretax into the Flex Benefits Payable liability account and transferred to the Flex Benefit bank account to be requisitioned by the employees to pay them back for unreimbursed medical expenses up to their elected total annual amount. The ED, the bookkeeper and the Board Treasurer administer the Flexible Benefit Program. The RSVP OM reconciles all of the bank accounts monthly, and the ED verifies that the reconciliation is correct. We pay federal expenses and then get reimbursed at the end of each month by completing an electronic payment request over the Internet. Since we obtain our federal funds on a reimbursement basis, the money does not draw interest.

The bookkeeper from Chadwick, Steinkirchner, and Davis (CSD) also does our monthly payroll tax checks and quarterly payroll tax reports, and a CSD accountant does our annual 990 and 990-T tax returns and completes W-2 forms for all employees. Every year, we hire an outside accounting firm to conduct a financial audit.

After completing payables, the ED runs a classified statement of Income and Expense at the end of each month. With this document, the ED is able to verify proper allocation of income and expenses. The ED enters classified expense totals into an Excel spreadsheet. This allows the ED to compare individual program expenses to the whole budget on a regular basis.

The ED prepares and the Board Treasurer presents combined and condensed financial statements to the Board of Directors at each monthly meeting.

We do not own any property or facilities. Our office space is provided as an in-kind donation from the US Bank in which our offices reside. We do not own any equipment with a value of \$5,000 or more. The supplies we own are our furniture, computers, printers, copiers, lamps, artwork, office supplies,

## **Narratives**

file cabinets and bookshelves and hutches. All of our supplies are documented in an inventory list that is updated whenever we get rid of or obtain new supplies. Any depreciation on larger supplies is accounted for by our accounting company, Chadwick, Steinkirchner and Davis at the time of auditing our financial records each year.

Mesa County RSVP has been successfully receiving and administering federal grants for almost 42 years. The current Executive Director has more than 20 years' experience writing, and managing federal grants. All necessary reports are always completed and turned in on time.

### **Other**

Not Applicable

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

Not Applicable