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Executive Summary

400 Missoula RSVP volunteers will address the Primary Focus Area- Healthy Futures; helping seniors to remain in their own homes for as long as possible, individuals receiving emergency food from food banks and improving access to information on health insurance and health benefits.

Missoula RSVP service activities will focus over 50% of our volunteer resources on the Primary Focus Area- Healthy Futures. The activities will lead to National Performance Measure outputs or outcomes in four work plans:

- 1) Outcome: 102 individuals will report increased social ties/perceived social support resulting from the delivery of a meal and daily check-in service by a trained meal delivery RSVP volunteer. 120 homebound individuals will receive the required dosage of 6 months of Meals on Wheels home delivered meals service.
- 2) Output: to actively provide emergency food from food banks to over 16,000 unduplicated people annually and strive to reduce hunger in our community.
- 3) Output: 400 home bound, low-income seniors will receive a supply of commodity food staples delivered to their doorsteps each month.
- 4) Output: to provide over 3,000 clients with health insurance and health benefits assistance saving nearly \$500,000 annually.

The CNCS federal investment of \$72,990 will be supplemented by \$39,360 in local grants, cash and in-kind donations.

Missoula County, Montana covers approximately 2,600 square miles in the western part of the state. Missoula County is the state's second most populous county with over 111,000 residents. The county seat is the City of Missoula, the only incorporated city in Missoula County, with a population of more than 68,000. The Missoula Urban Services Area contains 77% of the County's population.

Low-wage jobs dominate the economy with a poverty rate of 17%. Missoula County has the 7th highest poverty level in Montana for people over 65. By 2025 Montana will rank 5th in the nation with per capita population age 65 and older. U.S. Census data estimates (2008 - 2012) show that there are 6,092 or 13% people age 65 and older in Missoula County with a Cognitive, Ambulatory, Self-Care or Independent Living Difficulty. The Census' American Community Survey for 2006 - 2010 shows that there are 5,917 or 26% of adults age 55 and older with incomes below 200% of the federal poverty level also at risk for food insecurity in Missoula County.

In Missoula County there are an estimated 9,479 veterans and 756 Army National Guard.

Strengthening Communities

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Missoula RSVP will address the Primary Focus Area- Healthy Futures; helping seniors to remain in their own homes for as long as possible, individuals receiving emergency food from food banks and improving access to information on health insurance and health benefits.

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Doug Fischer, Program Operations Director of the Missoula Food Bank reports: "One in seven people in Missoula County struggle with hunger. Missoula Food Bank exists to actively provide emergency food to people and strives to reduce hunger in our community. In 2013 alone, Missoula Food Bank supported over 65,800 individual visits through our store and over 88,000 individual visits through all of our different programs. Over 10% of people using Missoula Food Bank's store program were aging adults over the age of 55 and one in three individuals served were children."

Susan Kohler, CEO of Missoula Aging Services the Area Agency on Aging reports: "Low-income, vulnerable individuals need assistance to remain in their own homes as long as possible. This option is less expensive and it reduces or delays further disability and chronic disease. It is preventive in nature, builds on the existing support systems and strengths of the individual, and often helps people continue to be vital community members for much longer.

Access to home delivered food, groceries, and emergency food supplies, along with access to information on health insurance and health benefits, provides assistance which also enables at-risk

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adults to remain in their own homes as long as possible.

Homebound individuals are most at-risk for loss of their current level of independent living due to many factors including an inability to create, obtain and sustain good nutritious meals.

County-wide programs supported by Missoula RSVP volunteers providing access to emergency food supplies and at-home delivery of meals and groceries include the Meal On Wheels (MOW) Program, various rural food pantries, the Missoula Food Bank and its USDA Commodity Supplemental Food Program. The demand for these services continues to grow.

In Montana an estimated 14% of seniors are at risk of going hungry, and food insecurity is growing, according to the National Foundation to End Senior Hunger. "I am calling it the decade of shame," said Enid Borden, founder and president of the foundation.

The Meals on Wheels (MOW) program serves homebound older adults and eligible people with disabilities under age 60 living in Missoula County with hot, home-delivered, nutritious meals. This program assures clients of an essential, healthy meal with the considerable benefit of a daily check-in by a trained meal delivery volunteer. The primary goal of the program is to provide for the dietary needs of vulnerable adults in order to allow them to continue to live independently at home. The demand for this service continues to grow. From Fiscal Year 2010 to 2014, the numbers of meals served has increased by 17 %. Significantly, 37% of the current clients are age 80 and older. The 2015 major goal is to deliver 95,000 meals and liquid supplement to 750 clients in Missoula County.

The Feeding America Charity reports: "Nationally 620,000 households that include at least one soldier, reservist or guardsman -- or 25 percent of the nation's total active duty and reserve personnel -- are seeking aid from food pantries and other charitable programs across the country. The Missoula Food Bank has only been tracking veteran households since 2012. Based on the information received through the Missoula Food Bank intake system, the percentage of veteran households served in 2012 was 7.5%. The percentage of veteran households served through July 2014 is 13.4%. This is a 6% increase in 2 years.

Through distribution of materials and support of community events Missoula RSVP volunteers support increased access for clients receiving information on issues regarding health insurance, health

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care access and health benefits programs. Partners such as the YMCA and Special Olympics report that there is an increased need to support services for individuals of all ages who wish to pursue a healthy lifestyle, but struggle to do so.

Lisa Beczkiewicz, Let's Move! Missoula Coordinator, Missoula City-County Health Dept. reminds us: "No one agency can meet the needs of all persons all the time. The entire community works together to distribute information engaging individuals of all ages and abilities on issues regarding health insurance, health care access and health benefits programs."

"The Missoula City-County Health Department supports community wide health benefit education activities that include programming supported by national recommendations for nutrition and physical activity. Individuals involved with these types of health benefit education activities help teach youth the importance of embracing a healthy active lifestyle and help to mitigate disease."

Missoula Aging Services, the Area Agency on Aging, provides health insurance, health care access and health benefits assistance to more than 3,200 individuals annually. Clients are helped with a full range of health insurance issues saving a total of \$500,000 during FY14. Missoula RSVP volunteers assist with classes, are certified SHIP counselors and act as appointment assistants resulting in improved efficiency. Volunteers, supervised by professionals, have more than doubled the capacity of staff to meet the ever growing request for assistance. Without RSVP volunteers, the physical and financial health of thousands of older adults and people with disabilities would be negatively impacted.

Additional demographic information about the county include the startling statistics from Kirsten Vorreyer, Court Appointed Special Advocates of Missoula (CASA) reports: More than one out of four Missoula County children live in poverty and almost half of those live in deep poverty, defined as 50% of the federal poverty level.

Homelessness has been a problem of increasing significance in Missoula since the early 1990's because of skyrocketing housing prices in the city and surrounding communities. Our local homeless shelter, the Poverello Center, is consistently full and their data shows them serving more families and working persons than ever before. The most common presenting problem for families whose children are seen

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in court is physical neglect, most often due to parental alcohol or methamphetamine use coupled with unemployment or low wage jobs. Despite a well- funded and innovative anti-meth campaign in Montana, Missoula is the only community that is not showing a reduction in Meth-related out-of-home placements. The national recession of 2008 had a severe effect on Missoula's low-wage earners and families are continuing to suffer from the slow economic recovery.

Missoula RSVP service activities will focus over 50% of our volunteer resources on the Primary Focus Area- Healthy Futures. The activities will lead to National Performance Measure outputs or outcomes in four work plans:

- 1) Outcome: 102 individuals will report increased social ties/perceived social support resulting from the delivery of a meal and daily check-in service by a trained meal delivery RSVP volunteer. 120 homebound individuals will receive the required dosage of 6 months of Meals on Wheels home delivered meals service.
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Data Collection Systems: A dedicated focus group designed a Data Collection System that supports the National Performance Measures and enforces the confidentiality of recipients. Focus group participants included Missoula Senior Corps Advisory Council, Senior Corps staff, professional educators, the sponsor Missoula Aging Services, the local Area Agency on Aging and Volunteer Station supervisors.

The Data Collection System is designed to Calculate, Measure and Accumulate Collected Data to support RSVP Performance Measure Requirements. This system is an integral part of the Missoula RSVP infrastructure included in the Memorandums of Understanding (MOU), the Missoula RSVP Orientation, the Annual Audit based on the Volunteer Station Checklist and the Data Collection Process.

The Data Collection Process consists of:

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- a) Review the agreed upon data sharing partnership outlined in the MOU
- b) Distribution and review of pre-data collection materials to Station Supervisors at beginning of grant period
- c) Quarterly check in with Station Supervisors
- d) Distribute post-data collection instructions and collection materials 2 months prior to collection date for the end of grant period
- e) Compile and analyze the data collected for grant end reporting

Missoula RSVP supports veterans and/or military families through 2 work plans in the Other Focus Areas. In Missoula County there are an estimated 9,479 veterans and 756 Army National Guard. Montana for Soldiers reports that they expect to serve over 800 active duty troops. The Poverello Homeless Shelter serves 50 unduplicated veterans with overnight services. Disabled American Veterans reports they serve over 1,000 unduplicated clients each year.

Missoula Senior Corps serves as the Volunteer Pillar for the Joining Community Forces (JCF) to strengthen community support for military members, veterans & their families in the Missoula Region. JCF provides a complete portfolio of community resources and services. By fostering relationships between the military and the community at large, veterans, active duty members and their families will have a better sense of community belonging. In conjunction with JCF the Missoula Veterans Center RSVP volunteers support ventures such as Stand Down projects and multiple community events for example Home for Hero's BBQs.

Four work plans in the Focus Area -- Healthy Futures will meet health needs within communities including access to care, aging in place and addressing childhood obesity. Access to home delivered food, groceries, and emergency food supplies from food banks, along with access to information on health insurance and health benefits, provides assistance which also enables at-risk adults to remain in their own homes as long as possible.

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Missoula community need is evidenced by statistics from the social service agencies that provide critical services plus the Census Bureau. Missoula County has the 7th highest poverty level in Montana for people over 65. One in seven people in Missoula County struggle with hunger. The percentage of veteran households served at the Missoula Food Bank is 13.4%.

Through distribution of materials and support of community events Missoula RSVP volunteers support increased access for clients receiving information on issues regarding health insurance, health care access and health benefits programs. Partners such as the YMCA and Special Olympics report that there is an increased need to support health benefits services for individuals of all ages who wish to pursue a healthy lifestyle, help mitigate disease, reduce obesity, but struggle to do so.

Missoula City-County Health Dept. reminds us: "No one agency can meet the needs of all persons all the time. The entire community works together to distribute information engaging individuals of all ages and abilities on issues regarding health insurance, health care access and health benefits programs."

Over 50% of Missoula RSVP volunteer resources will be focused on these activities:

1) 120 homebound older adults and individuals with disabilities receiving 6 months dosage of at-home delivery of meals through the Meal On Wheels (MOW) Program services from trained RSVP volunteer drivers that allow them to live independently. The survey tool will indicate that 102 homebound adults will report increased social ties.

2 & 3) 16,400 individuals receiving USDA Commodity Supplemental Food Program distribution and access to food banks, food pantries. RSVP volunteer serve as delivery drivers, in-take specialists, stocking and shopping assistants. The collection tool is the Missoula Food Bank Intake Tracking System.

4) 3,000 clients to whom information on health insurance, health care access and health benefits programs is delivered: RSVP volunteers support programs that helped clients with a full range of health insurance issues saving a total of \$500,000.

The collection tool is IRIS a state-wide tracking system for the Areas on Aging Agencies.

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Partners such as the YMCA and Special Olympics report that there is an increased need to provide health benefit information to support services for individuals of all ages who wish to pursue a healthy lifestyle to help mitigate disease and reduce obesity, but struggle to do so. The collection tool is a tracking system to record the number of individuals receiving health benefits information.

Each work plan serves veterans and/or military families.

**3Work plans focus on Education community need: according to the Montana Office of Public Instruction, in Missoula County 92% of the public schools served by the RSVP Tutor Program did not meet Adequate Yearly Progress (AYP) in the No Child Left Behind standards. By serving in Title 1 schools, RSVP Tutors directly impact low-income and at-risk students.

*Outcome based: Two Tutoring work plans serving a total of 200 children for K-12 Success. RSVP's will tutor at-risk, special needs students on a one-to-one or small group basis. The skills and talents of the RSVP's will be used to increase performance levels in literacy and/or math.

The Collection tool is based on per school standardized testing using an identifier to ensure confidentiality.

*Outcome based: 200 children served in child safety, welfare and health programs Community need: More than one out of four Missoula County children live in poverty and almost half of those live in deep poverty, defined as 50% of the federal poverty level. Homelessness has been a problem of increasing significance in Missoula since the early 1990's because of skyrocketing housing prices in the city and surrounding communities. Our local homeless shelter is consistently full and their data shows them serving more families and working persons than ever before. The most common presenting problem for families whose children are seen in court is physical neglect, most often due to parental alcohol or methamphetamine use and low wages. Court Appointed Special Advocates of Missoula (CASA of Missoula) is the only agency that provides court-ordered representation of abused and neglected children in the 4th Judicial District at no cost to the population they serve. There are currently 362 children involved in the court system due to abuse or neglect. CASA staff train RSVP volunteers to work on behalf of vulnerable children in the court system. Watson Children's Shelter provides a safe haven for over 100 Missoula and western Montana children in crisis annually; providing emergency shelter in a safe, nurturing home for children who have experienced physical

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abuse, sexual abuse, severe neglect, homelessness, abandonment or a family crisis. RSVP volunteers work on behalf of vulnerable children housed at Watsons. The collection tool is a tracking system to record the number of children served.

**2 Work plans focus on Economic Opportunity transitioning individuals into safe, healthy affordable housing. The 2013 Montana Point-in-Time Homeless Survey identified at least 196 homeless parents with 444 accompanying children in Missoula. Missoula was home to 74% more homeless families than Billings, the most populous city in Montana. Habitat for Humanity and the YWCA have dedicated programs designed to offer safe, healthy affordable housing. RSVP volunteers will help to build 2 Habitat for Humanity Homes. In addition, they will help with The YWCA Gateway Center and Ada's Place Rapid Re-housing program that serves the neediest families in the community by housing 50 individuals. The collection tool is Mortgages and rental agreements.

*Outcome based: Building or Assisting-Habitat for Humanity: Two safe, affordable houses will be built for low-income families. The collection tool will be mortgage in place for each house.

*Outcome based: Assisting with housing Search: 75 individuals will transition into safe, healthy, affordable housing. The collection tool will be rental agreements will be in place for each rental.

For the 2015 RSVP Competition Missoula RSVP will have 40% or 160 unduplicated volunteers or 30% greater than the required 10% serving in National Performance Measure outcome work plans.

Recruitment and Development

Missoula RSVP has a well-defined infrastructure that works in an interconnected fashion to achieve a highly successful and effective RSVP Program. The Senior Corps Management Plan works concentrically to support volunteer recruitment and development as part of the larger success of the co-located Foster Grandparents, Senior Companions and RSVP programs. This well-defined process has resulted in over 2,000 volunteers recruited in the past 13 years.

The Senior Corps Management Plan provides a solid strategy to develop high quality RSVP assignments and training opportunities to effectively meet community needs in both the Primary Focus Area and in Other Focus Area.

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These systems are an integral part of the Missoula RSVP infrastructure designed to ensure that Memorandums of Understanding (MOU) are in place, volunteers have access to the Missoula RSVP Orientation, opportunities to share their experiences, additional trainings, and recognition activities.

Volunteer Support focuses on preparing volunteers to succeed. Missoula RSVP has an extensive interview and placement process demonstrated by an 85% success rate for first time placements.

* The 2015 RSVP Competition Missoula RSVP Background Checks are in place as required by CNCS.

*Welcome to RSVP packet includes the RSVP Handbook, addresses program compliance, prohibited activities and general policies.

*3 times a year Volunteer Roundtables offer volunteers trainings, encourages sharing experiences, introduces new volunteer opportunities and recruits participants for the Leadership Task Force.

*Annual RSVP Volunteer Update packet includes annual forms updates, important notifications and reminders regarding prohibited activities to stations and volunteers including but not limited to displacement of employees, political, religious and lobbying activities.

*Missoula RSVP newsletter and social media offering new and interesting volunteer opportunities.

* Recognition for all agency volunteers is part of the sponsor's strategic plan and includes, among many other opportunities, an annual Volunteer Recognition event hosted by the sponsor Missoula Aging Services.

*Senior Corps recognition includes birthday cards (the most remarked upon of all recognition activities) and award nominations to promote their service.

*Retention: Missoula RSVP Retention Strategy is based on the theory: "People may not remember what you said, but they will remember how you made them feel!" All communication is designed to produce a "one-on-one" sensation. Making a strong connection with the volunteer, an emphasis on appreciation of what they achieve, telling them what their impact is and letting them know they and

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their work matters. Currently 47% have served more than 5 years.

Senior Corps' 32 year focus on inclusion, centers on creating strong partnerships with agencies that serve refugee, low-income, and populations with disabilities. This effort not only allows the diversity of our Senior Corps volunteers to reflect our community, it ensures that we offer services to these populations as well. Missoula County veteran population is approximately 11% while the Senior Corps veteran enrollment is 12%. MAS RSVP program has volunteers of all abilities successfully serving: those with loss of vision, hearing and mobility, those with degrees of English proficiency including non-English speakers.

Program Management

Volunteer Station Management focuses on station development, volunteer opportunities, effective volunteer recruitment and management.

*The Volunteer Station Checklist is designed to ensure that stations meet: Performance Measure requirements, program compliance, do not participate in prohibited activities, have the capacity to adequately provide data collection, ensure that volunteers are performing their assigned service activities, offer on-site training, have a signed Memorandum Of Understanding in place, opportunities for volunteers to share their experiences, recognition and retention strategies including nominating volunteers for awards and recommending volunteers to serve on the Senior Corps Leadership Task Force, abilities and skills to improve their communities and themselves through service in their communities. The items listed on the Checklist are used as the basis for structure for all the following components:

*Monthly New Station Introduction Sessions-- designed to educate potential stations about Senior Corps programs and promote response to National Performance Measures. The Session addresses program compliance, prohibited activities, data tools and collection, and on-site training to support highly-effective volunteering.

*Monthly New Station Orientation Sessions: for those stations meeting the Performance Measures requirements. Utilize the Volunteer Station Checklist Focus to develop a high quality volunteer experience/volunteer station meeting all program requirements.

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*Bi-annual activities with Volunteer Stations to include: Bi-annual Volunteer Management Roundtables: provide an opportunity for training and consultations including program compliance, prohibited activities, data tools and collection, ensuring volunteers are performing designated activities.

*Bi-annual station visits and/or consultations with each Volunteer Station.

*Annual Audit of the Volunteer Station utilizing the Volunteer Station Checklist.

*Consultations and technical assistance available on an as requested basis year-round.

Graduation of stations to increase focus on National Performance Areas: for the past three years Missoula RSVP has emphasized using attrition to reduce the number of Volunteer Stations. An important consideration in choosing which Stations to graduate was to not cause disruption to the volunteers. In each instance RSVP volunteers were offered additional RSVP volunteer opportunities. The transitions were relatively seamless because the volunteers as well as the stations were ready to move forward with the understanding that their service project did not meet RSVPs new Performance Measure requirements.

Additionally, RSVP has made very careful choices in the focus of any additional Volunteer Stations accepted. For the 2015 RSVP Competition, Missoula agreements are in place for 60% of the stations that will be graduating and we are continuing to work with those remaining stations and volunteers. To reiterate, the volunteers serving at these specified Volunteer Stations generally serve solely with these stations and have indicated they will continue to serve with them. We have designed and distribute an Opportunities Sheet that details local agencies and web sites such as Volunteer Match and the Missoula Volunteer Center, that can help promote volunteer needs, recruitment and post new volunteer opportunities.

Established in 1982, Missoula Aging Services (MAS) has 32 years' experience in managing Senior Corps projects. MAS sponsors a variety of programs structured around the volunteer ethic, most of which are targeted at seniors and the Primary Focus Area: Healthy Futures. MAS has 13 years' experience with programs centered on outcome-based programming including Senior Corps, Meals on Wheels, Resource Center, Case Management and a state-wide initiative --Senior Medicare Patrol. The sponsor has established the Missoula Senior Corps (MSC), whose sole focus is national and

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community service. In 1999, the State Office approved a waiver for a Program Manager to serve as the combined manager for all three MSC programs. Missoula Aging Services is dedicated to excellence in overall program management. To assure that level of excellence, the sponsor is committed to supporting a wage scale and benefits that allows us to hire the right staff and retain them for the long term. Senior Corps staff have a combined 66 years of experience with Senior Corps programs. There have only been two staff turnovers since 2001. All four staff members combined provide for nearly four full time equivalent positions dedicated to the management, development and support of RSVP, Foster Grandparent and Senior Companion Programming in Missoula County.

This model provides for significant cross training and offers appropriate educational opportunities. The result is a professional, well-trained loyal staff offering seamless support to all Senior Corps programs. The latest Monitoring/Review of the RSVP, SCP and FGP programs states that the programs are in compliance, use appropriate Outcome/Impact measurements and have developed support materials that add value to the programs. For the 2013 grant cycle the grant applications were again granted Exceptional ratings.

Missoula Senior Corps RSVP program competed for and was awarded two CNCS PNS grants and the EITC (Earned Income and Tax Credit) & Asset Building Initiatives sponsored by Capitol One. All were successfully fulfilled.

A Senior Corps Advisory Council representing all three programs is in place. Members have diverse backgrounds. The Council includes current Senior Corps volunteers, Station supervisors and community members who are knowledgeable about the human and social needs of the community. Members include professional educators, mental health professionals, media, human resources, and early education consultant. The Advisory Council has been commended by the State Office for its strong utilization of the CNCS Stake Holder Survey.

A sound organizational infrastructure supports the project. This strong structure ensures that RSVP volunteers serve with stations that have signed Memorandums of Understanding in place. Background check compliance strategy ensures that RSVP volunteers for the 2015 Competition Grant are eligible to serve. A mature senior management staff is in place, with recognized expertise in program development, financial management, planning and evaluation. This is supplemented by a

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governing board of directors, appointed by Missoula County Commissioners for their expertise in organizational management, finance, governance, strategic planning and evaluation.

Organizational Capability

Missoula Aging Services (MAS) has managed federal grants including Health and Human Services and CNCS funds since 1982. MAS has received unqualified opinion A-133 audits for the past 18 years while managing over \$26 million dollars of federal grants over the same time period. MAS employs qualified staff with accounting expertise and utilizes software specific to fund accounting to ensure accountability, efficient and effective use of resources.

MAS maintains the integrity of the systems as a whole by providing a spectrum of administrative, fiscal and personnel services. The agency owns its facility. The sponsor has clearly defined roles for staff and administrators and internal controls and policies, including travel, as detailed in the agency personnel policies.

Personnel Services: Supervision of Program Manager, formal staff annual evaluations, Staff interviewing, Benefits administration and personnel policy maintenance.

Administration Services: accounting, fiscal management, reporting and budgets, payroll and timesheet maintenance, purchasing, clerical support, IT support, fundraising, marketing & events planning.

MAS engages in a planning process that sets a four-year strategic goals and annual objectives for each program area. This is done with the involvement of constituent focus groups, the agency's advisory council and staff and is approved by its Governing Board of Directors. This mechanism is used to benchmark progress against established goals and objectives. The agency conducts annual evaluations for employees that include a self-assessment, evaluation and a SMART Objectives development plan to address the individual's training needs. Meetings with Project Staff, Volunteer Station Staff and Volunteer Leaders are held to assess current status and recommend adjustments as needed in recruitment plans, stakeholder support, etc.

Key Staff:

* Chief Executive Officer, Susan Kohler, has a B.A. in Gerontology with 30 years' experience in

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community development, executive non-profit management and senior advocacy.

* Debbie Lester, Chief Financial Officer since 1996, holds a B. S. in Business Administration, a B. A. in Sociology with 31 years of financial, audit and management experience and has oversight of the Senior Corps programs.

* Kathryn Hungerford, Development Officer, is an internationally recognized Certified Fund Raising Executive, is certified by the University of Montana Nonprofit Administration, has fourteen years of comprehensive development experience and training, and provides fundraising support to RSVP.

* Staci Bloomberg, Human Resources Generalist for Missoula Aging Services and licensed attorney in the State of Montana, has over 11 years of broad HR management experience.

* Colleen Baldwin, Missoula Senior Corps Program Manager since 1997, is Program Director for RSVP, FGP and SCP and has 30 years of program management experience. The Program Director directs and coordinates program activities to ensure goals and objectives are accomplished within the prescribed time frame and funding parameters.

* Ann Andre, Communications Coordinator at Missoula Aging Services since 2002, works closely with the Senior Corps team to plan and execute campaigns which publicize and market their programs for awareness, growth and retention. Ann holds an undergraduate degree from the University of Wisconsin-Eau Claire, with majors in Art and Spanish and a minor in Journalism with a 25-year career in newspapers.

* Helen Pohlman RSVP Volunteer Coordinator since 1991, has 35 years volunteer management experience. Activities include interviewing and matching potential volunteers, providing education, counseling and consultation with service sites and volunteers; marketing and recruitment strategies; maintaining electronic and manual data systems.

* Senior Corps Leadership Task Force: volunteers can choose among four Task Force opportunities. To recognize their volunteer's skills and experiences Volunteer Stations are encouraged to recommend volunteers to serve on the Task Forces. The Task Force offers leadership, skill growth and the opportunity to share their experiences. Each Task Force receives training to be highly effective in addressing Primary and Other Focus Areas and in topics pertinent to the specific Task Force role.

Twenty RSVP volunteer serve on the Senior Corps Leadership Task Force. The Task Force provides volunteers with opportunities for leadership roles focusing on increasing the effectiveness of the Missoula Senior Corps. There are four Task Forces:

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1) Volunteer Coordinator Task Force provides project management and volunteer coordination for Volunteer Stations and community events.

2) Outreach Task Force provides community Outreach and Recruitment support.

Assists with: promotional and recruitment efforts in the community such as Open Houses, special presentations or other recruitment events, radio, TV or other media outreach.

3) Disaster Services Task Force provides project management and volunteer coordination support for the Volunteer Reception Center, disaster drills and events.

4) Veterans Task Force provides project management and volunteer coordination support for veteran based projects and events

The sponsor, Missoula Aging Services (MAS) adequately staffs all positions and requires them to attend professional development training in the areas of regulatory compliance and restrictions, OMB Circulars, Federal Regulations, best practices and current trends in the field of aging and volunteerism. MAS contracts with professional organizations to supplement training events with responsive experts in the field. Internal controls, policies and operational procedures are reviewed annually and coincide with the A-133 Audit. In addition, MAS annually performs an agency risk assessment with regard to accounting practices, financial management, program operations, facilities and HR. This is performed when property and liability insurance policies are reviewed for renewal.

MAS Administrative Services Manager, Jan Seewald, is responsible for facility and equipment management, supply orders and the annual fixed asset inventory. Ms. Seewald reports to the Chief Financial Officer who also oversees the Senior Corps programs. MAS is responsive to staff needs by providing them the appropriate tools, including supplies, space and technology, to perform at the highest level.

MAS' highly qualified accounting staff make use of an efficient accounting system and specialized data base programs to support financial management and grant compliance. Data base systems include Volunteer Reporter, IRIS -- tracking resource client data, MASTS -- Montana data collection

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system and a Nutrition data base - tracking clients, nutrition preferences and home delivery routes. The accounting system allows for ease of distinguishing grant and non-grant related expenditures, identifies costs by budget, period and line item category. The accounting system also supports the differentiation between direct costs from expenses appropriate for administrative allocation. Budget to actual cost monitoring are a regular function of program review. Federal and non-Federal charges are distinguished separately and allowable in-kind revenue/costs are accurately recognized. Finally, the robust accounting system supports CNCS reporting requirements on the fiscal operations whereby reports are submitted timely and accurately. Supporting documentation is retained in compliance with CNCS requirements and available for review during monitoring visits.

c. Cost-Effectiveness and Budget Adequacy (15%):

Reviewers will assess the extent to which the applicant has demonstrated that:

MAS employs four highly qualified direct service staff within three Senior Corps programs. Their expertise is in professional Volunteer Management practices. Their combined experience and team approach creates an efficient and effective method of RSVP program management. All staff are qualified trainers in the field and are regularly called upon for their knowledge base. Staffing is adequate within the Senior Corps programs in part because the sponsor employs other professionals in the field of marketing and communications, finance, HR, IT, fundraising and other administrative support which allows Senior Corps staff the time to focus on volunteer management, recruitment, retention, recognition, station support and training. Colleen Baldwin, Senior Corps Program Manager charges her time to the excess budget during the periods in which she is grant writing, considered fundraising, according to CNCS regulations.

Fringe benefits and taxes are applied to staff wages at prevailing rates across all MAS staff and programs. Taxes are classified as FICA, State Unemployment and Workers Compensation. Benefits include health insurance, vision, dental, life, long term disability, and retirement. The total benefit package equates to 23% of total Wage & Fringe costs. An equitable wage and benefit program supports staff retention and satisfaction, thus reducing turnover.

Senior Corps staff travel rates of reimbursement and policy are consistent with the MAS sponsor. Local travel is justified on historical precedence and is reasonable for the 2,600 square miles of

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Missoula County. Travel is documented by mileage, food, and lodging forms. Travel costs support 400 volunteers and volunteer stations.

The RSVP program utilizes no contracted services. MAS, as sponsor, contracts with professional CPA firm to perform the annual A-133 Audit requirement. The audit, allowable under cost principles, is allocated to the RSVP program in accordance with the relative benefits received. The cost is treated consistently throughout all MAS programs with all other costs incurred for the same purpose in like circumstances.

MAS, as sponsor utilized an approved Cost Allocation plan which is applied consistently to all programs and services. All cost elements are determined to be Allowable, Reasonable, Necessary and in some cases Allocable.

Program supplies are justified by description of items and include desktop consumables necessary to support the 1.63 FTE staffing pattern and 400 volunteers. Estimated budget calculations include the prior year cost plus a multiplier for inflation.

Other RSVP program support costs include items classified as occupancy including utilities, building maintenance, janitorial, and insurance. Occupancy cost is based on the actual square footage of space housing the RSVP program and the actual cost per square foot adjusted annually. In addition, other support costs include communication, postage, internet and association dues.

Historically, budget constraints have prevented the RSVP program from fully supporting volunteer meals and transportation costs. Rather, RSVP program staff has been successful through the MOU process in encouraging volunteer stations to provide these necessary direct supports to volunteers.

The RSVP budget includes the required CIMA insurance to volunteers at prevailing rates. Volunteers understand through orientation and handbooks, that the insurance is the last resource in the event of injury or accident. Volunteer insurance through CIMA will cover all 400 volunteers including those that drive during the course of their regular volunteer duty.

Volunteer Recognition actual costs include birthday cards and events that recognize the value of

Narratives

volunteer service. Food, certificates, and venue costs support the 400 target volunteers within the program. Volunteer recruitment strategy is focused on hard to reach populations to include individuals of all abilities, from diverse races, ethnicities, sexual orientations, or degrees of English language proficiency, veterans and military family members as RSVP volunteers.

The RSVP program has a long established history with multiple funding sources including city, county and private support. RSVP will provide 35% in non-federal support for the program activities each year of the project.

Other

NA

PNS Amendment (if applicable)

na