

# Narratives

## Executive Summary

Since 1974, WestArk RSVP has been a program of the Western Arkansas Counseling & Guidance Center, Inc. The Guidance Center's mission is to provide a comprehensive network of quality behavioral healthcare services that are consumer sensitive, outcome-oriented and cost effective within a six county service area in western Arkansas. The Guidance Center generously supports its' program, WestArk RSVP, which will operate in Boone and Marion counties on an annual budget of \$52,311. The Corporation for National and Community Service will provide \$32,462 in federal funding.

The mission of WestArk RSVP is to enrich the lives of our members through significant volunteer service which enhances life in our communities. Our program purpose is two-fold: to engage persons 55 years of age and older in volunteer service to meet critical community needs; and to provide a high quality experience that will enrich the lives of volunteers. At least 92 RSVP members from Boone and Marion counties will volunteer through WestArk RSVP. WestArk RSVP will serve the communities of Boone and Marion counties and the RSVP members from the RSVP Center in Fort Smith, Arkansas and the RSVP office in Rogers, Arkansas.

In addition to partnering with community organizations, WestArk RSVP will direct its own program: RSVP Community Outreach. The program will increase the disposable incomes of low and modest income families and increase access by disabled and elderly Medicare beneficiaries to affordable healthcare. RSVP Community Outreach volunteers will serve by:

1. Partnering with the Internal Revenue Service Tax Counseling for the Elderly (TCE) and Volunteer Income Tax Assistance (VITA) programs by preparing and electronically filing federal and state (Arkansas and Oklahoma) income tax returns for senior citizens, Active Duty Military, disabled, non-English speaking, rural, and low income families.
2. Partnering with the Arkansas Senior Health Insurance Information Program (SHIIP) by serving as SHIIP Advocates to assist Medicare beneficiaries (both aged and disabled) in applying for federal LIS and Arkansas MSP, aiding Medicare beneficiaries in choosing Medicare Part C or D plans and by counseling new Medicare beneficiaries.

The primary focus area of this project is Healthy Futures. WestArk RSVP will be providing financial literacy services to over 100 families annually by Year Three of the grant.

## Strengthening Communities

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Q1. Arkansas is a state located in the southern region of the United States. The state has a low population density with roughly 54 people per square mile. Over a third of the state's population (1.15 million) live in rural Arkansas. According to the Census 2013 data, 73.7% of the state's population is white, 15.6% is Black/African-American, 6.9% is of Hispanic/Latino origin, 1.5% is Asian, and 1% is American Indian.

The geography of Arkansas varies widely. Much of Arkansas is still in its natural state including considerable wilderness area. Arkansas has 600,000 acres of lakes, 9,700 miles of rivers and streams, and 2.4 million acres of forest. Arkansas enjoys the four seasons in moderation and the longer spring and fall seasons provide a mild climate. However, Arkansas, is known for extreme weather and averages 33 tornadoes a year. It lies in the Dixie Alley where the biggest, most dangerous (E3-E5) tornadoes have been noted.

In 2014, CNBC ranked Arkansas second in Cost of Living and Cost of Doing Business but 42nd in Quality of Life. Median family income is \$39,806, ranking 49th in the Nation. In 2014, Forbes magazine ranked Arkansas the 8th worst state in which to make a living. Arkansas ranks 5th in the Nation for percentage of its population living below the poverty line.

This grant application is for Boone and Marion counties, which are located side-by-side in northwestern Arkansas. WestArk RSVP is the incumbent grantee for the area which borders Boone County to the west. Both counties are bordered by Missouri to the north. Both counties lie entirely within the Ozark Mountains.

Boone County had an estimated 37,396 residents in 2013. According to the U.S. Census Bureau, the county has a total area of 602 square miles, of which 590 square miles is land and 12 square miles is water. It has a population density of 62.5 person per square mile. Estimated median income in 2012 was \$38,364 for Boone County. Residents 55 years of age or older comprise 28% of the population. The percentage of persons living below the poverty level is 18.2% and is lower than the state average of 18.7%. The largest city is the county seat, Harrison.

North Arkansas College is a comprehensive, public two-year college located in Harrison, Arkansas, in the United States. The Harrison Daily Times newspaper has provided continuous local news since

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1876. Boone County was formerly home to a large lead and zinc mining industry. The economy is driven by agriculture and wood products, as well as service and light manufacturing. The top three employers are FedEx Freight, North Arkansas Regional Medical Center, and Pace Industries, an aluminum-die-casting company. The area draws many retirees. Tourism continues to play a role in the economy; travelers venture into Boone County as they head north on U.S. 65 to Branson, Missouri, or take a leisurely drive along Arkansas Scenic 7.

Marion County had an estimated 16,430 residents in 2013. According to the U.S. Census Bureau, the county has a total area of 640 square miles, of which 597 square miles is land and 43 square miles is water. It has a population density of 28 persons per square mile. Estimated median income in 2012 was \$38,364 for Boone County. Residents 55 years of age or older comprise 28% of the population. The percentage of persons living below the poverty level is 18.2% and is lower than the state average of 18.7%. The largest city is the county seat, Harrison.

Marion County was formerly home to a large zinc mining industry. One third of the county is under water and many water activities are available. Ranger Boat and Flippin Bass Boat Manufacturers are located in the county. Part of the Buffalo River runs through the county and features camping, hiking, canoeing, hunting, and fishing. The Lower Buffalo Wilderness Area is the state's largest wilderness area. Bull Shoals Lake has 19 parks scattered around its 1,000 mile shoreline. Yellville is county seat in Marion County, but the largest city is Bull Shoals.

WestArk RSVP is headquartered from a 2,700 square foot free-standing building in Fort Smith, Arkansas provided solely for the use of RSVP program by Western Arkansas Counseling & Guidance Center, Inc. Services to Boone and Marion counties will be provided from the RSVP Office in Rogers, AR which is 10 miles north of Boone and Marion counties

The Work Plans contain the sources for all data used to factually demonstrate the community needs of Boone and Marion counties. Using the data it is rational to conclude that poverty, experienced by nearly 20% of the population, is the catalyst for community needs. There exists in Arkansas society a small but significant proportion of families who are socially and economically disadvantaged. Being economically disadvantaged has a cascading effect on many aspects of family life. Community needs, which accompany poverty such as poor nutrition, limited access to health care, and lack of family

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support, are areas where volunteer services provided by RSVP members can affect positive change.

Through research, program feedback and current Census/QuickFacts Data (2013), WestArk RSVP has identified critical, unmet community needs in our Primary Focus Area - Healthy Futures. This choice was validated with input from the RSVP Advisory Council, staff members, community partners and preferences expressed by the current RSVP members who demonstrate their choices by the community needs they support with their volunteer services. Our choice of Healthy Futures as the Primary Focus Area exceeds the 25% requirement of unduplicated volunteers and will be supported by 84 of the 92 members of WestArk RSVP. The poverty rate in Boone and Marion counties exceed the national average. Efforts to alleviate poverty are led by area non-profit organizations and government agencies who hopefully will choose to partner with WestArk RSVP. For community organizations who have limited funding to support the manpower needed to accomplish their mission, RSVP volunteers will be a key element.

Our chosen Primary Focus Area is Healthy Futures and our three Objectives are:  
AGING IN PLACE, OBESITY AND FOOD, and ACCESS TO CARE.

WestArk is a large well established program that manages volunteers and provides program services over a substantial geographic area. Volunteer led tax services during the current year provided assistance to families in 142 zip codes. Meeting community needs, partnering with the most effective community organizations, and providing RSVP members with diverse choice of volunteer assignment mandates the need for eight unique service activities within our Primary Focus Area -- Healthy Futures.

AGING IN PLACE is a need sustained by the 8,905 adults, age 65 or older who make their home in Boone and Marion counties. Older adults in the service area experience poverty, hunger, loneliness and/or isolation at a rate higher than the national average.

Our chosen work plan for which we will report outcomes will be AGING IN PLACE, H8 Providing Financial Literacy. The need is reinforced by more than 10,000 employed older adults and over 20,000 employed disabled adults in our service area. The community need is best exemplified by 10% annual increases in the number of clients being served by our TCE program.

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OBESITY AND FOOD services are championed because Arkansas is among the states having the highest percentage of food insecure households. Hunger is experienced across all age groups in all five of the counties we serve. The need has increased with the recent decrease in food support offered through SNAP.

ACCESS TO CARE is always an issue in western Arkansas. Illiteracy, lack of transportation, and limited resources negatively impact older adults and disabled adults as they attempt to access affordable healthcare, prevent health problems, manage chronic illness and adopt a healthy lifestyle.

Q2. The following Healthy Futures needs/services lead to National Performance activities: 1) Aging in Place (H8) services include homebound meal delivery, companionship services in support of maintaining independence to hospice patients, frail elderly and seniors, and financial literacy services to include tax preparation for the elderly and disabled; 2) Aging in Place (H13) companionship services in the form of respite for caregivers; 3) Obesity and Food (H10) services at food pantries; 4) Access to Care (H2) Distributing Information includes providing information and aiding Medicare recipients, the uninsured, and cancer survivors.

Outputs are the immediate and specific results of a series of activities that are directly attributable to the volunteer. All of the outputs contained in the Primary Focus Area of this grant require service activities that are personal to the recipient and where the presence of volunteers has meaning to those served. Volunteers contribute to the organized mission and goals of volunteer stations while putting a human face to the delivery of services. Accepting assistance is difficult. Repeatedly, RSVP has experienced success because of peer-to-peer service delivery. Older adults serving as volunteers are able to draw on a lifetime of experiences; not dissimilar to those they are serving. Volunteerism is a powerful means of engaging people in tackling community challenges and it can transform the pace and nature of progress.

Outcomes are the way we demonstrate the actual measurable changes our volunteers program has brought to the community and the clients we serve. By measuring the number of older or disabled adults who have received financial literacy services we are able to track the following outcomes:

1. They have made an accurate and timely submission of their personal income tax return.

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2. They have maximized their possible credits and deductions and paid the minimum amount of required taxes.
3. They have saved a minimum of \$261 by receiving free tax services.
4. Their current individual financial situation has been reviewed and suggestions and referrals to other available resources have been made.

Q3. WestArk RSVP will track RSVP program outputs (volunteer hours, units of goods services delivered, number and type of clients served) and the identified National Performance Outcomes (see our Work Plans for details).

Evaluation is a collaborative, ongoing activity involving people working at all levels in the organization. Data collection is a key activity. Volunteers are integrated into every activity associated with the RSVP Community Outreach Program and are crucial to our evaluation efforts to track outcomes.

In order to support data collection of Outcomes for the tax program, a Microsoft Access program was customized to meet our program needs by our IT department. Volunteer Screeners enter data as it is collected from individual taxpayer into a laptop computer. A report is printed out and attached to the taxpayers file. The data is automatically accumulated in a database that generates the reports necessary to meet the reporting requirements for our RSVP grant and for our Community Service Block Grant.

The collaborative process for identifying Outputs is aimed at dealing openly and honestly with difficulties and working together at all levels to design a workable and useful system. Like any approach, it requires goodwill and effort to make it work. All volunteer stations working toward Primary or Other Focus Areas will be provided with a copy of the Work Plan and an explanation of the reason data collection is necessary. Issues dealing with data collection will be dealt with on a case-by-case basis. It may be necessary to assign a volunteer the responsibility for reporting data from their work stations. All efforts at data collection will be ongoing and monitored for workability and acceptance by our community partners.

Assessing the effectiveness of our tax program in achieving a critical community Outcome will be

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accomplished by utilizing the reports made available to us by TaxWise (the provider of our tax software) the IRS, by the Community Service Block Grant Screening database. Staff will monitor these reports throughout tax the season to ensure National Performance Measure outcomes and outputs are measured, collected, and managed effectively. Interim outputs such as number of tax returns prepared, total refunds, Earned Income Credit amounts will be posted daily for review by the volunteers with side-by-side comparisons of the prior year's numbers.

Outputs will also be measured by the volunteer stations where the service activities are performed. Data will be reported along with the volunteer hours of service on a monthly basis to the physically closest RSVP location by the Volunteer Station staff. The data will be entered into Microsoft Excel spreadsheets by the RSVP Volunteer Coordinators who will responsible for the collection and management of the data.

Q4. The WestArk RSVP program includes significant services to veterans and military families. WestArk RSVP serves military families through providing free tax preparation assistance. Preparing federal tax returns for military families requires specialized training and certification by tax volunteers. Annually, at least ten WestArk RSVP tax volunteers will successfully complete training and receive the IRS certification necessary to prepare accurate tax returns for military families. Contact is made with area military bases and Military and Family Support Centers to broadcast availability of our free tax services. Last year 80 military families had their state and federal tax returns prepared and electronically filed by WestArk RSVP resulting in an average savings of \$261 per family.

Free tax assistance is also available to veterans and their spouses who are 60 years of age or older and to younger veterans and their families if their income is less than \$52,000 per year. Last year we prepared and filed tax returns for 497 veterans and 337 spouses of veterans.

Services are provided for veterans and their family members who are Medicare beneficiaries, need assistance in applying for federal Low-Income subsidy (LIS) and the Arkansas Medicare Savings Programs (MSP); problem solving snafus with Centers for Medicare/Medicaid Services and private insurers; and counseling new Medicare beneficiaries. Qualification for Arkansas MSP provides an added benefit to veterans who have previously chosen to receive their medical care only from VA

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services as it pays the Medicare Part B premium and waives penalties for late enrollment.

Qualification for LIS may result in the provision of prescription medications at a lower rate than the \$8 VA medication prescriptions.

Q5. In the Primary Focus Area of Healthy Futures, community needs are identified using quantitative data cited in each work plan. We have no way of knowing which of the Healthy Futures service activities are currently being supported by RSVP members. Every effort will be made to ensure that community needs are accepted and supported by RSVP members and volunteer stations with whom we will partner.

The service activities to be carried out by the RSVP volunteers historically have resulted in the outputs stated in each work plan. The output targets were chosen after reviewing historical data and estimating the growth anticipated in each area for the next three years. Each output target contains a clearly stated numerical accomplishment expected of the volunteer service activity and a description of the volunteer activities to be performed by RSVP members.

Data collection, while fairly complex for the Work Plan containing an outcome (see Q3), is gathered in-house in a program executed by WestArk RSVP. Data collection is simplified for the work plans containing only an output. Using a traditional data tool (monthly volunteer time sheets) and adding a single reporting requirement will minimize duties RSVP asks of its partners. RSVP Volunteer Coordinators already have the job responsibility to collect monthly volunteer time sheets and monitoring an additional piece of information will require little additional effort.

Q6. The Other Focus Areas represented in this grant application include, Economic Opportunity, and Disaster Services. The sources for all data used to factually demonstrate the community needs of Boone and Marion counties are contained in the individual Work Plans. The Other Focus Areas will be supported by 8 of the 92 members of WestArk RSVP.

Service Activities to meet community needs for free tax assistance for low income families in support of Economic Opportunity Focus Area include Assisting VITA. WestArk RSVP will continue to operate the largest VITA site in the state of Arkansas. Data will be collected from reports generated by the TaxWise software and the IRS. At least 100 families will have their tax returns prepared free-of-

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charge annually. If an Outcome had been made available for assisting VITA it would have been WestArk RSVP preferred outcome. The services provided under the Economic Opportunity Focus Area are aligned with the National Performance Measure to contribute to the economic well-being and security of economically disadvantaged people.

The service activity of Training was chosen to meet the community need for personnel trained to operate Volunteer Reception Centers identified in the Disaster Services Focus Area. This is a new area for WestArk RSVP. All RSVP programs in Arkansas have agreed to support the service activity of training RSVP members to operate Volunteer Reception Centers. The Arkansas Department of Human Services (DHS) Division of Community Service and Nonprofit Support (DCSNS) will provide volunteer training regionally. At least 4 RSVP members will attend quarterly training. Attendance sign-in sheets will be used to gather the output data. The services provided under the Disaster Focus Area are aligned with the National Performance Measure to help individuals and communities prepare, respond, recover, and mitigate disasters.

### Recruitment and Development

Q8. The creation of volunteer assignments has more than one starting point and exemplifies different perspectives. Volunteer stations need to identify assignments that meet their varied organizational needs. Potential volunteers present themselves at WestArk RSVP requesting volunteer assignments that connect with their particular interests, skills, and abilities. WestArk RSVP Community Outreach program demands highly skilled, computer literate lifelong learners as volunteers.

Volunteer stations are required to create a volunteer job description for each assignment for which they request placement of a RSVP member. This presented an obstacle for the volunteer coordinators (or the employees tasked with managing volunteers). In our local communities, the turnover rate among non-profit employees is high. Working with volunteer station personnel who are experienced in developing volunteer assignments and job descriptions is unusual.

In an effort to resolve this issue, a section of WestArk RSVP website was developed and entitled PARTNER RESOURCES. Within this section is a link to an on-line Volunteer Job Request form. This fill-in-the--blank form walks you through creating a basic volunteer job description and is required of any organization requesting a volunteer from WestArk RSVP. The submitted form arrives

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at the desktop of the RSVP Program Manager who reviews the form to ensure it is a well-developed, high quality volunteer assignment, and compares the requested volunteer position with RSVP work plans for suitability. If necessary, the RSVP Program Manager contacts the organization with suggestions on improving the job request. Inappropriate requests are declined and the organization is notified of our decision and the rationale.

Once approved, the volunteer stations are afforded an opportunity through a Partner Submission Login link to submit text of a written summary of their open position for inclusion on the WestArk RSVP website. Partner submissions are then loaded into the VOLUNTEER section of WestArk RSVP website under the link to Volunteer Opportunities and immediately made available to the public. Since all volunteer opportunities are digital it allows staff to immediately forward opportunities by email to interested members, the media and streamline placing information into print publications such as the RSVP Newsletter.

The volunteer spirit of our communities is a point of pride. Not a week goes by without someone entering our offices wanting to become a RSVP member and volunteer. All potential members are asked to complete a two-page Enrollment Form which includes questions about their skills, talents, interests, veteran status in the Armed Services, occupations and former employers. The information gathered on the Enrollment Form is used as a starting point for an extensive conversation with an RSVP staff member about what type of volunteer assignment would best meet the needs of the volunteer and the community. Some volunteers want to use their current skills, some want to learn a new skill and a handful are completely undecided.

Generally, two or three potential placements acceptable to the new member are chosen and RSVP staff connects the volunteer with the appropriate contact person. All new members are asked to contact RSVP staff following their investigation of potential volunteer placement. Assignments are made at this point or additional potential placements are explored until the volunteer is satisfied. Occasionally, we are presented with a new member who has unique skills (mediator, truck driver, baker, etc.) and requests a volunteer assignment to use those skills. RSVP staff members then "shop" this volunteer to our community partners and aid in creating a unique volunteer assignment.

Q9. Our primary focus area is Healthy Futures. Aging in Place (H8) and Access to Care (H2) are

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projects offered through our RSVP Community Outreach program along with Economic Opportunity: Financial Literacy (O1). These focus areas are projects presented under the umbrella of the RSVP Community Outreach program as free tax preparation and Medicare assistance. They require significant orientation, mentoring and on-going training in order to build new skills and develop program leaders. Both of the volunteer stations -- the IRS and the Arkansas Insurance Department, Senior Health Insurance Information Program (SHIIP), in addition to training, require volunteers to pass annual competency training and receive certification.

WestArk RSVP makes use of partnerships and community resources to meet the training needs of RSVP Community Outreach program volunteers. SHIIP, CMS, IRS, West Central Center on Aging, Arkansas Foundation for Medical Care, the Oklahoma Tax Commission, and Arkansas Division of Revenue Services provide annual volunteer training. RSVP members with professional backgrounds in finance or the medical field also serve as instructors and serve as mentors.

Volunteer opportunities with the RSVP Community Outreach Program were specifically designed with the satisfaction of the RSVP members in mind. Partnerships with the Internal Revenue Service and with Arkansas SHIIP were developed because both organizations have formal training programs for volunteers. In addition to the training materials provided by the IRS, the state of Oklahoma and Arkansas have developed training and reference materials for volunteers and provide on-site training. Arkansas SHIIP in addition to providing on-site training also coordinates large group trainings which utilizes trainers from the Centers for Medicaid & Medicare Services and the Arkansas Department of Human Services.

After RSVP Community Outreach Program volunteers receive formal training (which is repeated annually), they are mentored by staff and more experienced volunteers until they are comfortable and successful in their volunteer positions. All RSVP Community Outreach volunteers are regularly informed of the impact of their service on the community.

All new members of WestArk RSVP receive an individual orientation from a RSVP staff member prior to beginning service. The focus of the orientation is to inform the new members of the benefits and duties associated with membership and to explain how their volunteer activities will serve community needs and respond to National Performance Measures in the area of Disaster, Education, Economic

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Activity, Healthy Futures and Veterans and Military Families. But, volunteer stations bear the responsibility of training RSVP members assigned to their organization as volunteers. WestArk RSVP suggests to all its partners that they schedule formal training and orientation and promote dates, times and locations of training publicly as a mean of recruiting volunteers. We have found success in this "Schedule it and they will come" methodology of volunteer recruitment. It has been our experience that once individuals have made a decision to volunteer they want to start their service immediately. Volunteer stations which do not have formal training all have an orientation followed by "on-the-job" training and mentoring.

RSVP Advisory Council members receive an all-day orientation each year and have access to any of the RSVP specific training.

Q10. According to estimated 2013 Census data, Boone and Marion counties has a population of 53,826 citizens. Boone and Marion counties has an estimated population of 14,979 citizens who are 55 years of age or older.

Boone and Marion counties has limited racial diversity. According to 2013 Census estimates, 96.7% of the population is white. The racial classifications of Black or African American, American Indian and Alaska Native, or Asian each account for a less than 1% of the population. Hispanics account for 6.9% of the population of Arkansas. In Boone and Marion counties (2.2%) the number of Hispanics is less than the state average.

Non-English speakers account for 7.1% of the population of Arkansas. In Boone and Marion counties (2.4%), the number of Non-English speakers is less than the state average. Spanish is the predominant language spoken in non-English speaking households in the grant area.

WestArk RSVP's mission is to recruit volunteers to meet critical community needs and to provide a high quality volunteer experience that will enrich the lives of our members. As the focus of RSVP has shifted from reporting hours and numbers of volunteers to reporting outcomes the importance of members' satisfaction in their volunteer experience has increased. Recruitment no longer involves a shotgun approach and is more precisely focused to recruit volunteers to meet a specific program need.

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WestArk RSVP works to improve the skills and abilities of local volunteer coordinators and strongly supports "all volunteer" non-profit organizations -- especially in the areas of recruitment and volunteer management. Partnerships have been and will continue to be developed with volunteer stations who provide opportunities for RSVP members to learn new skills or use skills they have spent a lifetime acquiring, develop leadership potential and experience a satisfying and meaningful volunteer experience.

New volunteers will be recruited using the following channels: our website, [www.WestArkRSVP.org](http://www.WestArkRSVP.org), recruitment events, public speaking engagements, appearances on local television (western Arkansas and northwest Arkansas share the same media market), VolunteerMatch, Public Service Announcements released to Spanish and English language radio stations, press releases to local print and electronic newspapers, multiple articles in the WestArk RSVP Newsletter (which will be distributed to more than 600 area churches, and community venues of interest to seniors), and the old-fashioned way -- staff and current members (especially Advisory Council members) ask people directly to volunteer. Recruitment materials, plans, and presentations previously developed and proven successful will be used to meet current needs.

Over 50% of the current WestArk RSVP members have an email address and are web savvy. Responding to this preference, a web site is maintained for WestArk RSVP, serving as a catalogue of volunteer opportunities and a bulletin board for RSVP volunteers. The new interactive website went online in 2009 which provides the program with the ability to update every aspect of the website without outside assistance or cost. A significant portion of the new website is dedicated to recruiting new members. The web site, [www.WestArkRSVP.org](http://www.WestArkRSVP.org), averages over 500 'hits' a month.

The WestArk RSVP program currently supports 81 members who are veterans of the Armed Services. Outreach to inform veterans about the RSVP Community Outreach program services of use to veterans puts RSVP in contact with the veteran organizations in our service area and is used as a recruitment tool.

Volunteers for projects are frequently recruited from within the circle of acquaintances of current RSVP members. RSVP Community Outreach Program is focused on serving those with modest incomes and efforts to recruit volunteers who reflect the demographics of the geographic community

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served is necessary to the success of our outreach efforts. Experience has repeatedly proven the need for peer-to-peer counseling for Medicare beneficiaries. Outreach to the Hispanic and African American community is accomplished by targeting Spanish speaking radio stations, African American focused newspapers and by contacts with area churches whose membership serves the Hispanic and African American community. Disabled members of the community are encouraged to join WestArk RSVP and accommodations are frequently made to support RSVP members.

WestArk RSVP works to improve the skills and abilities of local volunteer coordinators and strongly supports "all volunteer" non-profit organizations - especially in the area of recruitment. Volunteer recruitment events are hosted by WestArk RSVP and training is offered to local volunteer coordinators in how to effectively recruit volunteers.

Q11. WestArk RSVP has excellent volunteer retention. The most common reasons for exiting the program: death, poor health, increased caregiving responsibilities, and moving from the area are beyond the control of the program. WestArk RSVP staff begin to work on volunteer retention immediately after recruiting a new member. Orientation of new members includes information about our community partners and their varied volunteer opportunities. Volunteers are urged to contact RSVP staff anytime they are unhappy with their current assignment or just wish to make a change. They are made aware all RSVP staff are willing to notify volunteer stations when the RSVP member no longer wants to continue a volunteer assignment. This willingness to allow "easy exit" has resulted in many members who might have considered leaving RSVP simply changing their volunteer assignment. RSVP staff always supports members who are leaving because of caregiving responsibilities. It has been our experience these members frequently return to volunteering when their caregiving responsibilities end.

WestArk RSVP hosts volunteer recognition events such as the "Breakfast of Champions" which is limited to RSVP members with a minimum of 48 hours of service annually and community events such as the Holiday Open House which allows members to attend with guests and encourages supporters to stop by the RSVP Center and Office. The "Breakfast of Champions" will be scheduled in April to ensure the most accurate reporting of volunteer activities is available at the end of each grant year. The Breakfast of Champions is a buffet held from 7 a.m. until 9 a.m. to allow attendance by working RSVP members. Beverage service is provided by Volunteer Coordinators and staff from our

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partner volunteer stations.

A change was made in 2011 to recognize volunteers for the outcomes of their efforts rather than for total hours volunteered (No more "Top 20" volunteers). Many of the most critically needed volunteer assignments do not result in a high number of reported hours. Articles will be written for the WestArk RSVP Newsletter highlighting volunteers meeting critical community needs. All WestArk RSVP Newsletters are available on our website in full color.

Some RSVP members have no interest in recognition events. All RSVP members will receive small recognition gifts such as an appointment calendar, lapel pins, etc. Letters of appreciation accompany all gifts.

As the focus of RSVP has shifted from reporting number of hours and volunteers, the importance of measuring outcomes ensuring members' satisfaction in their volunteer experience has increased. Partnerships have been developed with volunteer stations that provide opportunities for RSVP members to learn new skills, develop leadership potential, and experience a satisfying and meaningful volunteer experience.

All RSVP Community Outreach volunteers are regularly informed of the impact of their service on the community. During tax season a chalkboard is updated daily reporting the number of TCE and VITA returns prepared, the amount of refunds and total Earned Income Credits. Most of our RSVP Community Outreach volunteers judge the quality of their volunteer experience by the need for their effort. So, marketing efforts and partnerships with local media ensure demand for services stays high. Retention of RSVP Community Outreach volunteers is 100% (health permitting) as is their satisfaction with their volunteer efforts.

### Program Management

WestArk RSVP has a strategic vision for technology to insure the overall quality of service RSVP provides to the community is not limited by staffing. RSVP sees technology as playing a supportive and empowering role in our management of the program. We use technology to: 1. Create and foster community within WestArk RSVP and partner organizations. 2. Increase efficiency, accessibility, accuracy, and timeliness of information flowing between RSVP partners, staff, and volunteers and enable them to communicate and collaborate easily. 3. Allow RSVP publications, enrollment, and

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insurance forms to be available electronically. 4. Promote economy through the RSVP website which will serve as a hub for partners and volunteers to access information about volunteer opportunities, community activities and service programs at their convenience.

A substantial commitment of resources has been made to provide RSVP with excellent computer software and hardware to enable the program to gather the data and manage the information necessary to meet the program's needs. Software is updated as revisions become available and staff are trained as necessary on such revisions. All RSVP employees have the use of a computer, software and Internet access. A 2009 AT&T grant allowed us to create a dynamic website in which every aspect of web content may be easily manipulated by RSVP staff at no additional cost and not require the use of external contractors.

Q12. Management of volunteer stations starts during discussions with new RSVP members or experienced members seeking a new assignment. RSVP members are made aware of the terms and limitations of their service: no replacement of paid employees, no dangerous activities, the necessity of their volunteer hours being reported on a monthly basis, etc. Volunteers are encouraged to contact RSVP staff about any concerns that may develop with their volunteer assignments.

When a volunteer station seeks a collaboration with WestArk RSVP or when WestArk RSVP approaches a new community partner, an explanation of affiliation with CNCS is provided. Limitation of volunteer service are reviewed and the Memorandum of Understanding is examined by both parties. This encounter allows both parties to ask questions, seek common ground and identify potential areas of concern.

Q13. Every time there is a change in volunteer leadership at one of the volunteer stations, the new staff person will be contacted by RSVP staff and the MOU as well as current volunteer assignments will be reviewed by both parties. On-site visits will be made at least quarterly. The majority of volunteer stations will be visited monthly as Volunteer Coordinators deliver and pick-up monthly volunteer time sheets.

While a formal protocol (explained in the previous paragraph) exists, our greatest tools have proven to be casual contact. We have found that concerns about volunteers not performing are most often

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brought up by station personnel during events such as volunteer fairs we hosts, participation in community groups and professional organizations. Volunteers whose assignments have changed usually bring up their concerns at recognition events or when they come in contact with RSVP staff out in the community.

Q14. On two occasions previously, WestArk RSVP has made changes that drastically affected RSVP members and volunteer stations. In May 2010, when there was a 20% cut in federal funding, three volunteer stations outside of our two county service area were notified by telephone and in writing that due to budget cuts we would no longer be able to partner with them or support their volunteers. Volunteer station directors preferred to make the announcement to their volunteers. Letters were mailed to each volunteer from WestArk thanking them for their service, explaining the necessity of the changes, and urging them to continue to volunteer. It was a sad event, but no bridges were burned.

In August 2010, WestArk RSVP competed for and was awarded a grant for three counties in northwest Arkansas whose sponsor had chosen to give up their grant. Transfer activities were accomplished and all northwest Arkansas volunteers were contacted individually by mail asking them to re-enroll with WestArk RSVP. Articles in our newsletter explained to the membership at large the need for the re-enrollment and the reason for the change. Although it took nearly two years of patient explanations, meetings with volunteers and volunteer station personnel, and publicizing our program to the community before we were accepted as a community partner. If awarded Boone and Marion counties, we expect to handle the transition of the program from the current Boone and Marion counties RSVP program (who has chosen not to compete for this grant) in much the same way.

MOU renewals occur towards the end of each three year grant cycle. Inactive volunteer stations in which no RSVP members are volunteering and who have not submitted requests for volunteers are not renewed. Volunteer stations, who despite our best efforts are unwilling to provide volunteer hour reports, are not renewed. Volunteer stations who are unwilling to provide volunteer assignments are not renewed.

No RSVP program currently exists in Boone and Marion counties. The grant is funded at a level that makes employment of a full-time staff person impossible. This grant, if awarded, will be managed as

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part of the WestArk RSVP grant which covers five counties in northwestern Arkansas. The prior RSVP ceased to exist two years ago so we anticipate not having to graduate any stations or displace any volunteers with the new Work Plans contained in this grant application. If the need should arise the stations and volunteers of those stations graduating will be contacted by telephone and by mail. Displaced volunteers will also be offered the opportunity to be placed at another RSVP volunteer station.

Q15. The RSVP Community Outreach Program was developed with an eye to assessing impact. Recordkeeping by the IRS is impeccable and provides documentation of services provided and outcomes of those services. Record-keeping to fulfill grant requirements from Arkansas SHIIP also provides documentation of services provided and outcomes of those services.

Q16. WestArk RSVP has an Advisory Council which is operated by written by-laws which are reviewed and approved by the WAC&GC Board of Directors. The RSVP Advisory Council consists of no more than 20 members who are representative of their communities. At least twelve of the Advisory Council members are to be RSVP volunteers with current volunteer assignments, preferably in a leadership role. Three members will be selected from each of the following age groups: 55-64 years, 65-74 years, and age 75 and older. The Advisory Council will reflect the demographics of the community. Four of the Advisory Council members are to be representatives of volunteer stations. Preference will be given to representatives of volunteer stations included in the Primary Focus area. One Advisory Council member shall be a representative of the Sponsor. The RSVP Program Director shall serve as a non-voting Advisory Council member.

Our protocol for adding volunteer stations is as follows: No volunteer assignments are ever added to our Volunteer Opportunities unless a signed Memorandum of Understanding is in place. No RSVP members are ever placed in a volunteer assignment unless a Memorandum of Understanding has been signed by RSVP and the volunteer stations. Information regarding the Memorandum of Understanding is entered into the Volunteer Reporter database as soon as possible.

Volunteer Reporter software is a wonderful tool. Using the software allows us to monitor the status of MOU renewal. At least quarterly, reports are generated by the Volunteer Manager which show the upcoming MOU needing renewal. New MOU are created and the task of meeting with volunteer

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stations to review and sign a new MOU is assigned to staff.

Potential volunteers are interviewed about their age and willingness to volunteer on the very first contact by staff to ensure the eligibility of the applicant within RSVP scope. Information on potential volunteers who are too young to participate in RSVP is maintained in a file and they are contacted by staff after their 55th birthday.

### Organizational Capability

Q17. In 2004, WestArk RSVP was formally recognized by the Corporation for National and Community Service for the outstanding success of the program. In a letter dated October 20, 2004 the CNCS CEO David Eisner stated Mrs. Reehl and Mrs. Walker, "re-energized WestArk RSVP by developing new and innovative programs, recruiting volunteers with diverse backgrounds with an emphasis on volunteers from minority communities, males, retired professionals, and individuals between the ages of 55 and 65.". That same effort and expertise will be put to use in implementing this grant. WestArk RSVP plans to operate this grant in the same thoughtful, progressive, and innovative way it has for the past decade.

Infrastructure to provide sound programmatic and fiscal oversight is already in place and has been proven adequate. Experienced staff will provide the day-to-day operational support to ensure compliance with RSVP program requirement. Best use of resources will be accomplished by using the existing financial system. Resources are hard won by RSVP and only with the most meticulous attention to detail has allowed the program to grow and accomplish its goals. Community Development Block Grants from the city of Fort Smith twice in the previous eight years have been approved for infrastructure improvements.

The program is housed in the RSVP Center, a 2,700 square foot free-standing handicapped accessible building dedicated solely to RSVP use by the sponsor. The RSVP Center has a full kitchen, three restrooms, three offices, and two large meeting rooms -- one of which is used as a computer lab. The RSVP Center allows RSVP to host volunteer training and short term volunteer projects. The "club house" aspect of the RSVP Center provides volunteers with a focal point or base of operation which enhances their identity as volunteers and promotes organizational loyalty.

The RSVP Office in Rogers is a 1,000 square foot handicapped accessible building rented from the

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Schmeiding Foundation. Both locations offer services from the RSVP Community Outreach program. With program facilities operated at two locations which are 87 miles apart, there is convenient access for clients and RSVP members. Boone and Marion counties RSVP members will be served from the Rogers, Arkansas RSVP Office.

Q18. The Program Director reports directly to the CFO and to the Board of Directors annually. The Program Director is a multifaceted position and is chiefly responsible for ensuring the proper coordination and overall effectiveness of the WestArk RSVP's operations, finance, and programmatic functions. The Program Director will provide leadership in the areas of strategy, accounting and financial management, grants administration, performance evaluation and planning. The Program Director will bring a strategic, high-level perspective to WestArk RSVP's ongoing activities and administration.

The Program Director has direct responsibility for operations, financial leadership, and the programmatic strategy of the organization. The Program Director manages the organization's relationships with external agencies for resource development, compliance and contract administration. The Program Director will work with the CFO, Board of Directors and Advisory Council to ensure the WestArk RSVP's long- and short-term goals and objectives remain paramount in the organization's daily work while fostering a positive and creative work environment.

The Program Director supervises and will work collaboratively with the Program Manager whose responsibilities include: direct oversight of the Volunteer Coordinators, compliance with programmatic requirements such as gathering volunteer and station data, and ensuring the current status of all Memorandum of Understanding. The Program Manager will also lead efforts for volunteer recruitment and be responsible for volunteer placements. In addition, the Program Manager will serve as an instructor and program administrator for the tax program while ensuring the highest quality financial literacy service is delivered to area taxpayers.

Volunteer Coordinators will provide direct community contact in their assigned service areas in order to establish and maintain relationships with volunteers, partners and community organizations. They will recruit, screen, place and monitor volunteer assignments for RSVP members. Volunteer Coordinators will gather information about volunteer activities and enter it into the database. It will

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also be Volunteer Coordinators' responsibilities to aid volunteer stations by providing tools such as customized monthly time sheets and supporting the development of volunteer assignments.

WestArk RSVP currently has three full-time paid staff members; Program Director, Susan Reehl; Program Manager, Trish Walker; and Volunteer Coordinator, Karen Tyler. Both Reehl and Walker are Certified Volunteer Managers. Each staff members has over 20 years of non-profit management experience. Mrs. Reehl has been Program Director since 2000 and she is the third WestArk RSVP Program Director since 1974. Mrs. Walker has been with RSVP since 2003 and Mrs. Tyler just completed her first year of employment. A new full-time Volunteer Coordinator will be hired to serve Boone and Marion counties.

Mrs. Reehl has a BA in Economics and Business and extensive experience working with older and disabled adults, Medicare beneficiaries, and with directing programs which provide services to clients in rural Arkansas. Mrs. Reehl was a member of the 2009 class of Leadership Fort Smith -- a prestigious and highly sought year long process of personal and professional development offered through the University of Arkansas - Fort Smith.

Mrs. Walker directed our TCE and VITA tax program beginning in 2008 (our first year as an IRS grantee) through 2014. Mrs. Walker was certified through the advanced level of tax preparation each year. She currently serves as the Tax Program Coordinator and primary instructor for both the TCE and VITA grant programs. Her work experience includes nine years as the Area Director for a national non-profit organization where she acquired a certification in non-profit management.

Mrs. Tyler has a Master Degree in Education and extensive experience working with children with developmental delays and directing a non-profit community organization. As Volunteer Coordinator, she manages the RSVP office in Rogers, Arkansas which hosts a TCE tax program in which she serves as a Tax Site Coordinator. She has responsibility for volunteer coordination in Benton, Carroll, and Madison counties in northwest Arkansas.

Performance expectations for each employee will be aligned with organizational goals. All employees will be held accountable for achieving results that support the agency's strategic plan goals and objectives. For this to happen, employees must have a direct line of sight between performance

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expectations and recognition systems and the agency mission. These links will be communicated to and understood by employee, enabling them to focus their work effort on those activities most important to mission accomplishment

Q19. Written policy and procedures contained in the ADMINISTRATION POLICY MANUAL guide the organization and are annually reviewed, updated and then approved by the WAC&GC Board of Directors. The ADMINISTRATION POLICY MANUAL is maintained by the WAC&GC to equip both employer and employees with a means to ensure compliance with all relevant organizational rules and regulations. The manual details the administrative, programmatic and financial controls for our organization which operates programs in ten counties with annual revenues in excess of \$12 million.

WAC&GC undergoes an outside review every three years during the CARF (Commission on Accreditation of Rehabilitation Facilities) accreditation process. CARF accreditation recognizes organizations who achieve accreditation through a consultative peer-review process and demonstrate their commitment to the continuous improvement of their programs and services with a focus on the needs and outcomes of the persons served. WAC&GC has been continually accredited by CARF for the past seventeen years and was re-accredited for three years (the maximum possible) following an inspection and site visit in 2012.

WAC&GC asset management plan incorporates detailed asset inventories, operation and maintenance tasks, and long-range financial planning to ensure annual revenue reserves and reinvestment are sufficient to facilitate the long-term viability of the system. RSVP manages a large amount of IT and office equipment because of the service needs of the RSVP Community Outreach program. Staff has use of three laptop and four desktop computers, a high resolution projector, laser printers both color and black and white in addition to a support system to maintain a high speed Internet access. Volunteers have access to ten lap top computers and 17 personal computers to meet current service needs. Computers are regularly replaced every three years. The WAG&GC IT Director supports the RSVP program in managing its assets, suggests purchases and provides technical support.

Q20. The WestArk RSVP is a program of and is sponsored by the Western Arkansas Counseling & Guidance Center, Inc., (WAC&GC). WAC&GC sponsorship provides employment structure for RSVP staff, program supervision, accounting oversight, IT support and use of the RSVP Center. The

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WAC&GC is a large non-profit organization with ten service locations and manages its IT and accounting functions internally at the Primary Service Center in Fort Smith. The WAC&GC has income in excess of \$12 million annually. Standard accounting practices are used and are verified by an annual outside audit. When the audit is accomplished the findings are reviewed annually by the Board of Directors.

Grant reporting is the responsibility of the RSVP Program Director. WestArk RSVP oversight is provided by the WAC&GC Chief Financial Officer, Gary Luedloff who is a Certified Public Accountant with over 35 years of experience. Mr. Luedloff also supervises the RSVP Program Director who has a BA in Economics and Business. Systems exist to accurately account for grant funds and match by budget line item.

The RSVP Center is located six miles from the Primary Service Center. WestArk RSVP staff maintains physical control of the checkbooks at the RSVP Center and generate all purchase order. All checks require two signatures and all signees are WAC&GC employees who are physically located at the Primary Service Center. None of the RSVP staff has the ability to sign checks. All funds for RSVP are maintained in two accounts at a financial institutions not used by WAC&GC. A separate checking account is maintained solely for the RSVP grant funds. Bank statements are reconciled by the CFO.

WestArk RSVP has managed federal grants since 1974. During the preceding 40 years, annual audits performed under Generally Accepted Auditing Standards (GAAS) have revealed no issues or concerns with the grant funds awarded to WestArk RSVP by the Corporation for National and Community Service or any other grantors.

Currently, WestArk RSVP is managing (in addition to its RSVP grant) two federal grants from the Internal Revenue Services. A Tax Counseling for the Elderly (TCE) grant was awarded for three years (approximately \$15,000 annually) and a Volunteer Income Tax Assistance (VITA) grant (\$41,600) was awarded for a single year. Annual financial reviews by the IRS have indicated grant funds were expended and accounted for in an appropriate manner. The TCE grant for the FY 2014-2015 has been approved. The 2015 VITA grant was applied for in May and grants are expected to be announced in October.

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In 2010, WestArk RSVP competed for and was awarded a grant for an adjacent three county RSVP program that had been relinquished by its sponsoring organization. Of those three counties, Benton County is to the north of Boone and Marion counties and Madison County is to the east of Boone and Marion counties. The program office was moved from Bella Vista, Arkansas to a central location in Rogers, Arkansas in November 2011. This expansion increased the federal funding and program size of WestArk RSVP by 50%. In 2012, WestArk RSVP competed for and was awarded a relinquishment grant, which increased federal funding by 28%. Crawford County (one of the original counties served by WestArk RSVP) is south of Boone and Marion counties.

### **Other**

Not applicable.

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

Not applicable.