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Executive Summary

An estimated 280 RSVP volunteers will serve 5 rural counties in Western Montana (Lake, Lincoln, Mineral, Ravalli, Sanders Counties and the Flathead Indian Reservation). Some of these activities will include

1. Food Delivery to Homebound
2. Transportation to Medical Appointments for Seniors and Veterans
3. Food Collection and Food Pantry Support
4. Assisting in Classrooms
5. Collecting and Recycling Materials
6. Tax Tutoring

The primary focus area of this project is Healthy Futures. At the end of the three year grant 80 homebound or older adults and individuals with disabilities receiving Food Delivery will report increased social ties/perceived social support and 100 individuals receiving support to alleviate long-term hunger will report increased food security.

The CNCS federal investment of \$108,514 will be supplemented by \$ 48,889 from non-federal sources.

Strengthening Communities

Description of Community

Area VI RSVP serves Lake, Ravalli, Mineral, Sanders and Lincoln Counties and the Flathead Reservation. This large geographic area in Western Montana (11,483 sq. miles) has a population of 104,281, one third of whom are over the age of 60. The 1,244,000 acre Flathead Reservation is the residence of the Confederated Salish, Pend d'Oreille, and Kootenai Tribes. 30 percent of children and 22 percent of seniors live below poverty level. Major employers (logging, mills, mines) are shut down, leaving low paying service jobs as the primary employers. While unemployment in Montana is 4.8 percent, joblessness in the service area ranges from 6.4-13.4 percent, with 10.8 percent unemployment on the reservation. Western Montana is physically beautiful but economically depressed.

Community Need in Primary and other Focus Areas

According to the census data, 23 percent of the service area residents are over the age of 60 and over one third of those are over age 75. Of those, 44 percent of senior households are in the very low

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income bracket. Many are dealing with issues of aging, including self care, mobility, transportation, and poverty.

As the baby boom generation (those born between 1946 and 1964) reach retirement age, Montana is projected to age at a significantly greater rate than other states in the nation. By 2025, Montana is projected to have the third highest proportion of people age 65 and over in the nation (24.5 percent of its total population). The fastest growing age group will be those 85 years of age and older. In 1990, 1.3 percent of Montana's population was 85 years of age or older. By 2003, this percentage had increased to 1.9 percent, the seventeenth highest rate in the nation. By 2025, 3.1 percent of Montana's population is projected to be 85 and older, the fourth highest percentage in the nation. By 2030, one in every four Montanans will be 65 or older.

Agencies working with seniors identified a lack of support for caregivers and those living alone. Feedback includes: "Almost every day I receive 1-2 phone calls from families who are at the end of their resources and are struggling to provide care to a loved one living at home." Judy Shostak, Lake County Council on Aging.

"Services for the elderly are not growing to meet demand, in fact many services are being cut or eliminated that seniors depend on for their health and welfare." Lori Smith, Adult Protective Services.

As the economy worsens, basic needs are becoming critical needs including nutritious food. The Council on Aging (through a series of community focus groups) and the Area Agency on Aging have identified several other areas that are needed to support seniors so they are able to remain in independent living arrangements. Services, such as, friendly visitation, home chores, telephone reassurance, transportation, information and assistance on availability of services and understanding the nuances of insurance, Medicare and Medicaid are all needed in the service area. According to Area VI Agency on Aging Information and Assistance coordinator Jane Nicolaus, these services are critical for at-risk seniors remaining in their homes. 39 percent of those receiving assistance with daily living tasks are at risk for nursing home placement.

Both Kathy Sital (Ravalli County Council on Aging) and Judy Shostak (Lake County Council on Aging) expressed the same concern that nursing home placement as a result of loss of a caregiver is a critical issue and we must find ways to help seniors continue living at home. There needs to be creativity in how we do this. The ombudsman from Mineral County (Vicky Carrott) expressed the

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exact same issues and concluded with I absolutely believe that telephone support is an excellent idea and hope you will put this in place.

Service Activities and Performance outputs and outcomes

In low income rural communities, there is need in every focus area. 280 RSVP volunteers will contribute at least 30,000 hours to organizations in Lake, Mineral, Lincoln, Sanders and Ravalli Counties and on the Flathead Indian Reservation to help build and support infrastructure for effectively providing education, basic human needs, health services, disaster preparedness, recycling, housing, services to Veterans, and to homebound or older adults and individuals with disabilities that allow them to live independently in their homes.

Here is a quick overview of how volunteers will help meet the needs of their communities.

Healthy Futures

The average income in the service area is \$28,820 which is 83 percent of the average income in Montana and 61 percent of the national average. With such low income it is very difficult for residents to save and/or provide for long term care as they age. Nursing home rates in Montana are \$72,270 per year. Volunteers will provide rides to medical appointments and shopping for those unable to drive themselves. They visit the homebound and provide social support including in-home hospice. These services allow people to remain living at home as long as possible. RSVP receives referrals and out of state calls every week from family concerned about aging parents who are alone. Without RSVP there would be no organization matching the individuals in need with willing volunteers

U.S. Census Bureau figures indicate 27 percent (6,439) of the seniors in the service area (32,728) are living alone while 37 percent (9,045) have a disability. Resources to promote independent living for seniors and disabled adults in danger of premature institutionalization are extremely limited or nonexistent in many isolated communities. Transportation services and social contact for seniors who are isolated and without other resources is a primary concern in the entire service area. According to Janice Winston, Montana Department of Transportation, there are only two communities in the entire five county service area that have public transportation and in both communities there is a limited service range. According to Eric K. Shinseki, Secretary of Veteran Affairs, Access to services for our veterans remains one of our top priorities. We continue to look for ways to leverage technology to improve access and engage veterans. Even the best care anywhere will

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have no impact unless our veterans can make it to their appointments. Transportation to medical appointments is extremely important as many of the Veterans are no longer able to drive themselves and the VA hospital is between 100 and 250 miles away from the counties served. According to the Valley Veterans Service Center in Ravalli County which serves over 5,000 veterans annually, accessing medical care is a major problem for Veterans.

At least 300 seniors receive home delivered meals. The Director of the Ravalli County Council on Aging indicates that the seniors receiving commodities and home delivered meals are at high risk for early institutionalization, if these services were not available. Volunteers are critical in the delivery of these services. The hospital guild in Mineral County continues to expand the home delivered meals program to seniors who do not eat nutritious meals on days that meals are not delivered.

Below are comments made by one of our coordinators. I live in a small community made up of mostly senior citizens. I'm afraid of what would happen in our little town if there was no RSVP. Our hospital is on the verge of closing but through our RSVP coordination we are able to provide volunteers 7 days a week for meal delivery. We are one of the poorest counties in Montana, through RSVP we provide volunteers so our Women in Timber can remain open and provide clothing and household items to the needy. Our Pioneer Council is the only provider of transportation in Mineral County and they are able to do so only with RSVP volunteers. RSVP is the key provider for Health and Information to our community thru workshops and monthly meetings. Once a month a group of RSVP volunteers meet at the Mineral County Chamber of Commerce office to discuss how they can make their community a healthier place to live. They have facilitated a variety of training and information forums. A couple years ago a gentleman asked about providing information on diabetes; he had just been diagnosed as a diabetic and found nothing local, so they arranged for the St. Patrick's Diabetes Care Center to make a local presentation. This group has presented speakers on Breast Cancer Awareness, and Medication Assistance for those who can't afford their prescriptions. Counts are kept of attendance.

Our friendly visitor program is a vital link in the effort to keep seniors in their homes as they age. Independent living is facilitated by RSVP volunteer service: We had a volunteer who was willing to buy groceries for a man in the last weeks of his life while his wife was unable to drive due to surgery, allowing him to die in his sleep at home. (The volunteer continues to help his surviving wife with her grocery shopping.) Volunteers can respond to requests from the elderly and their families that come in to our office regularly as their health and/or cognitive function decline.

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Volunteers will visit isolated seniors and disabled adults on a regular basis. They will provide transportation for shopping, medical appointments or social outings; help with household management tasks; visit; provide telephone reassurance and assist with hospice care. Staff and volunteers will conduct interviews and surveys of clients to determine how services improve their lives.

Education

Libby is a community in crisis that has seen an increase in adult crime, creating more children with a parent in jail and more children in need of adult role models. Over 30 percent of students in Lincoln and Sanders Counties are below poverty (Kids Count). Real estate statistics report that 50 percent of the homes in Libby are in foreclosure. Kids Count reports that 53 percent of children in the service area schools are on free/reduce lunch. 10.5 percent of Lake Households are single parent and 3.4 percent children are being raised by a grandparent. 14 percent of High School students need specialized help as reported in the Montana Prevention Needs Survey.

A critical issue identified by teachers, school volunteers, and parents is the need to work one-on-one with at risk students to improve academics. The Polson School District CRT (Criterion-Referenced Test) scores 29 percent of the economically disadvantaged students below proficiency in reading; this is 3 times the number of children who are non-economically disadvantaged and below proficiency. It also reports that American Indian students are twice as likely to score less than proficient as the white students. The Polson School District is 38 percent Native American and has 56.5 percent of students receiving free/reduced lunch

Lake County struggles with a 6.5 percent dropout rate and 17.1 percent of their youth age 16-19 are not in school, not working, and not looking for work (Montana is 7.6 percent and the U.S. rate is 9 percent). The need for services that impact youth, seniors, families, and the general public are enormous and continue to grow. Volunteers will provide one on one tutoring for students identified by teachers and teachers will report on the number of children participating.

The Department of Justice reported in 2002 that nearly 800,000 children are reported missing each year. The average victim of abduction is an 11 year old girl who is a low risk, normal child from a middle class neighborhood. 300,000 children end up being sexually exploited in the fastest growing crime in the world---child trafficking. Child trafficking is initiated by moving a child to a place where

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no one knows them and they have no one to depend on except their abuser. Even in a small rural community, the potential for child trafficking is a growing concern. Lake County is located close to major corridors to other states and Canada including I 90 and Rt. 93. Finding abducted and run away youth before they leave the local area is critical.

RSVP volunteers manage a safety project to produce ID files. These files include photos, movies, voice profiles, descriptive information, and digital fingerprints. RSVP provides ID kits at early childhood screenings and kindergarten registration and community events. Parents have critical information readily available if a child should disappear. Parents sign permission slips which serve as our count.

Veterans

According to 2010 records of the US Department of Veteran Affairs there are an estimated 11,323 veterans residing in Lake, Mineral, Lincoln, Ravalli, and Sanders Counties and the Flathead Indian Reservation. The veteran population is representative of the increase in the overall aging population. The region representing Missoula County, Lake County, Mineral County, and Ravalli County (3 of these counties are part of the service area) is projected to have the largest aging Veteran population 65 years and older over the next two decades reaching 22.44 percent by 2025.

Montana conducted a non-scientific statewide survey to determine the individual needs, preferences and opinions of Montana veterans. Approximately 1700 copies of the survey were mailed out and 450 surveys were returned, representing a response rate of 26.47 percent.

Some of the survey highlights are:

28 percent of the respondents receive daily help with cooking or meal preparation, 25 percent with medications, 17 percent with bathing, and 16 percent with dressing or grooming.

22 percent of respondents indicate they needed independent living services which were not available in their area.

Disproportionate numbers of rural Americans serving in the military creates a disproportionate need for veterans' care in rural areas. These services include many things that enhance the quality of life for veterans including help with educational and job related services, accessing basic needs, helping with transportation, filing for benefits and helping with reintegration. Transportation and many other services such as stand downs, accessing basic services and receiving community recognition of their service to our country would not be available without volunteers. Sign in sheets and counts by agencies providing services will be the basis of output data.

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Disaster

The establishment of emergency plans, preparing disaster kits and providing information for safety checks are needed to ensure the safety of seniors living alone as well as, the community at large.

Within this five-county service area, there is a continuous threat of disaster situations. There are three major geological fault lines, two primary highway systems and two major railroads that are all used for transport of toxic chemicals and materials, three large dams with hydroelectric projects that supply electric power to several western states, 80+ percent of the area is forested, and a National Level 4 bio-terrorism research facility is located in Ravalli County. Thus, there is a very apparent risk of forest fires, floods, landslides, earthquakes, chemical spills, or targets for terrorist organizations that could potentially impact the lives of everyone living in the service area.

The service area has already experienced several disaster scenarios including major forest fires, serious flooding, landslides as a result of fires and flooding, several toxic spills as the result of train derailments and truck accidents. In addition, every year there are many instances of home fires, and missing persons (our area is a huge back country hiking and skiing destination for people who are often unprepared for the parameters of the Rocky Mountains). Volunteers are the backbone for assisting the first responders. Being rural, responders often come from long distances. Local volunteers are needed for immediate response and to provide emergency support and housing for displaced victims. The LEPC (Local Emergency Preparedness Committee) identified as a key role for volunteers is helping provide meals for responders. During major disasters volunteers man the community information center, so that responders are free to fill more critical needs. Preparation activities include hosting neighborhood preparedness meetings and helping distribute information to the community. Signed volunteer timesheets will be the documentation of the output.

Environment

There was one recycling program in Ravalli County. At its peak, this recycling program annually diverted 2185 tons of local waste from landfills. Unfortunately, the high cost of transportation of recyclable materials from rural areas made it impossible for this business to even breakeven and in April 2010, they shut down the recycling center. For the many residents who are trying to preserve our environment, this was a huge loss.

There is no mandatory recycling and the local trash company has no interest in providing this service. An RSVP initiative helped start a recycle drop off center which has now formed its own non-profit.

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With only 2 part time employees, it depends heavily on the volunteers who man the drop off site.

Habitat for Humanity recently opened a reusable building supply store and three non-profit thrift shops joined together to sort and ship excess textiles to an organization that has the resources to recycle these items, otherwise they would go to the landfill. Each of these entities has only one or no paid employees. None of them could operate without volunteers.

Recyclables including textiles are transported to regional centers that weigh the materials, providing a record of tons recycled.

Economic Opportunity

7 percent of adults age 25-34 have not graduated from High School and over 18,000 children in Montana live in a household where no one has a High school diploma. The need for basic literacy services for adults is well documented for Ravalli County. Of those 18 and older in the county, 7,871 people have not achieved a high school diploma, and 1,491 of those have not completed 9th grade (justia.com, 2011). While this number may include some seniors who are still enrolled in school, it is clear that more than 6000 people in Ravalli County lack a high school diploma or its equivalent. In 27 years of operation, Bitterroot Literacy has assisted more than 3245 adults. They served 182 students last year; 49 students completed their High School Equivalency. For the past four years, their graduates have outnumbered the combined total of graduates from Darby and Victor High Schools. Since the level of education is closely related to income, it is important to provide opportunities for adults to obtain their GED. This increases the potential for being employed and/or increasing income level. All tutoring is done by volunteers.

Roughly 8 percent of those over 65 living in the service area are below the federal poverty level. There is evidence that low incomes have some correlation to education levels. Providing support for filing taxes is a critical service for many residents. Last year RSVP volunteers helped over 600 seniors with tax questions and filing.

In 2012, the per capita personal income in Ravalli County was \$23,636, more than 35 percent below the national average. An overwhelming 44.5 percent of the population in Ravalli County lives below the Federal Poverty Level. Habitat for Humanity (HFH) is dedicated to the elimination of substandard housing and works to break the cycle of poverty, one family at a time. Low incomes

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make it difficult to purchase a home. HFH is the only local entity which provides families with a mechanism for buying a home. The criteria for family selection of 30-60 percent of the median county income (\$40,525), makes all the families served under the federal poverty rate (\$24,315 for family of 4). With 22.5 percent of families with children under 5, there are many families who would benefit. Volunteers are the backbone for meeting this need for housing.

Volunteers will assist with a variety of activities including tutoring adults working on their GED, helping build homes for low income families, and working with seniors on their tax returns. Sites track the number of people helped which will be our source for data.

Capacity Building

The small population base in Montana and especially in the rural counties has created a community dynamic in which most services are provided by nonprofits (over 400 in the service area) because counties do not have the money to support them. As a result, a small population base is asked to support many organizations with cash and in-kind donations. All volunteer food banks work with many groups to garner the donations needed to supply a growing need for food. Hospitals are dependent on volunteers to run blood drives and other nonprofits depend heavily on in-kind donations for fundraising events. Without these, many services would be severely limited. A quote illustrates the value of volunteers working to build capacity. ¿RSVP totally staffs the Koats 4 Kids program. This year RSVP staff collected and distributed over 1,800 coats, mittens, boots... This program would be gone if RSVP were gone. Volunteers will assist with fundraising events which support non-profits both with cash and in-kind donations. Activities will vary depending on the type of fundraiser, but could include preparing a mail campaign, taking tickets or serving at dinners, or soliciting items for an auction. Non-profits record donations as part of their accounting process and can supply dollar figures of income.

Infrastructure to support data collection and management

RSVP will orient sites to the requirements for data collection and provide any forms that will be required. Coordinators will check in on a semi-annual basis to check on progress towards goals. In the case of data collection that requires surveying clients, this will be an on-going process managed by the coordinator in each county. Where appropriate, some output information may be incorporated into timesheets that volunteers submit. We¿ve had success in the past gathering output information

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from sites, by providing them forms with specific questions. Some Outcome information will be gathered by written and oral surveys administered by staff and/or volunteers.

Service to Veterans in Focus Areas

Last year 3057 rides were provided to veterans for medical appointments. This activity is incorporated into the Healthy Futures focus areas as it is a demonstrated need for transportation for seniors. As part of the Veterans focus area activities, volunteers will assist with providing basic needs by helping at stand downs, providing information to Veterans, and implementing other community based activities such as the Veteran History Project. Because the service area hosts such a high number of veterans, the activities in all the other focus areas, while not limited to Veterans in need, will be providing services to Veterans, as well as, to other residents. Veterans will benefit from in-home support, food collection, recycling, tax mentoring, and preparing for disasters.

Recruitment and Development

Recruitment includes widespread distribution of flyers, posters and providing information to the media. Brochures are left at places that seniors frequent like doctors' offices, hospitals, the chamber of commerce, senior centers. Presentations are made to service clubs like Lions, Eagles, Soroptomist, Rotary and church groups. Since our current volunteers are our best recruiters, we use volunteers when making presentations and manning recruitment tables during community events. RSVP volunteers have helped develop recruitment plans, write volunteer manuals, design marketing materials, and write successful grants for their sites.

Other strategies:

- Partner with the Foster Grandparent Program for referrals
- Place RSVP volunteers as capacity builders, recruiting volunteers for their site
- Help sites develop jobs that use specialized expertise or offer unique opportunities
- Training in self development and leadership for volunteers
- Intergenerational service projects
- Make volunteers aware that short term and flexibility in scheduling is possible
- Inserts in church bulletins
- Explain to volunteers how they are "Making a Difference"

Infrastructure for quality assignments

Key to a quality experience is making the right match. This starts with a one on one interview with

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each volunteer. Then using job descriptions providing a wide range of opportunities RSVP matches jobs to the volunteer's experience, skills, and interest. This matching is facilitated by our database which uses a skills and interest list and matches these with jobs. Finding the optimal match is one of the most important pieces for success because the right match excites and motivates volunteers. We have developed a monthly "News Flash" for each county to highlight new jobs and remind volunteers of upcoming events and still needed job placements. These are emailed to volunteers and put on our website. New residents who visit the Chamber of Commerce are regularly referred to our office by RSVP volunteers who work at the chamber.

RSVP uses a phone notification system to alert sites to volunteers with specialized skills and volunteers to new opportunities. This has been very successful in matching volunteers with jobs that they find interesting and challenging. When volunteers have specific expertise we notify sites and request job descriptions that will effectively utilize these. The volunteer meets with sites to determine where they feel they can best share their knowledge to meet the need. The advantage of this approach is that it often allows a volunteer to create a unique job that they have a passion for but a site had not previously identified.

Plan for training

RSVP provides clear expectations to stations that they must provide the appropriate training for volunteers. We also offer in-house and collaborative trainings which expand the knowledge of volunteers in areas that support the needs of sites. These include grant writing, friendly visitor, literacy, reuse/recycle, tax preparation, working with Alzheimer's clients, and disaster preparedness. We have partnered with professionals from Council on Aging to teach our in-home visitor volunteers to identify safety issues, when it is time to defer to a professional, and how to relate to clients with dementia. Volunteers are invited to attend the ServeMontana Symposium and Governor's Conference on Aging with staff when topics are relevant to their volunteer job. An RSVP volunteer holds bi-annual workshops that help our volunteers with various computer topics. RSVP works with the Ravalli County Non-Profit Partnership which regularly brings trainings to the county which address capacity building for non-profits.

Demographics and recruitment

With the exception of the Flathead Reservation, Western Montana is 97 percent Caucasian. The biggest element of diversity is a differential in social-economic conditions. High income people come

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to retire. But many young families and older seniors live at a low standard of living. In the most rural counties 26 percent of the seniors 60+ are classified as low income. RSVP enables low income volunteers by defraying gas expenses and several of our sites provide meals to the volunteers. This extra support helps facilitate different economic groups working side by side.

Many of our volunteers are classified as disabled and many others simply deal with the limitations of age; staff keeps abreast of what type of jobs these individuals are able to do and make efforts to provide these opportunities to this group first. Case Workers with the disability agency Opportunity Resources are aware of RSVP and refer potential volunteers. We have successfully partnered a mentally disabled adult with another volunteer as a mentor to help him perform successfully as a volunteer.

The Flathead Reservation is unique as most residents are not Native American (the historical reason dates to homesteading in 1910). Only 16 percent of residents on the reservation are minorities. There is friction between natives and non-natives which is addressed by integrating volunteers of different cultural backgrounds into agencies where there is no division of services to native and non-native clients. Schools have successfully integrated the student population and school volunteers build bridges between youth of different cultural backgrounds. An intern from the Salish tribal Fatherhood program has helped us develop stronger relationships with tribal members, particularly through the project to preserve Veterans' stories.

According to 2010 records of the US Department of Veteran Affairs there are an estimated 11,323 veterans residing in the service area. Montanans and the Indian Reservation are very proud of their military service and as many veterans age, they choose to reside in Western Montana. The region representing Missoula County, Lake County, Mineral County, and Ravalli County (3 of these counties are part of the service area) is projected to have the largest aging Veteran population 65 years and older over the next two decades reaching 22.44 percent by 2025. Veterans have already demonstrated their willingness to work for the good of all, so they are prime candidates to recruit to RSVP. We are developing partnerships with many Veteran groups like VFW, Viet Nam Veteran Association, American Legion, and Wounded Warriors. The Veteran History Project (video taping soldier stories for the Library of Congress) has been a powerful conduit for getting veterans involved as volunteers as well as, a way to serve Veterans.

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Retaining and recognizing volunteers

While many volunteers prefer not to receive any sort of accolade, many really appreciate our presentation of Presidential awards, an annual volunteer lunch, and public recognition of volunteers at county fairs, in newspapers, and featuring volunteers in our newsletter and on our website. We have set up magnetic boards displaying volunteer photos that are in the office and taken for display at community events. There are also digital photo frames in 5 locations that rotate through photos of volunteers at work. Special effort is made to recruit low income volunteers as ushers and ticket takers at events that invite them to stay for the show which they otherwise could not afford to attend. Most recently we added a one-on-one presentation at individual stations of a special RSVP Senior Corps pin to recognize some outstanding volunteers during Senior Corps week. The Volunteers appreciated these individual presentations in front of their co-workers, even more than the presentations of hours awards during our large group lunches.

RSVP staff work to foster a personal relationship with each volunteer by at least monthly contact by phone, postcard, or email, and sending birthday and holiday cards. We have made some tough decisions about use of funds in order to have part time coordinators in four of our five counties, because we find that the personal relationship with staff who live in the community is really important. Making volunteers feel connected to the staff, the other volunteers, and the program is probably the most important piece to support retention. Volunteers regularly drop into the office just to say hi. This "open door" affords volunteers an easy way to mention problems, questions, or to just visit. Visits at sites to check in on how things are going promote a connection between volunteers, sites, and RSVP staff.

Program Management

Management of Station Compliance

As an incumbent program, we already have in place MOUs which include policy for not displacing employees, providing accessibility and reasonable accommodation, and prohibition of discrimination on the basis of education, income, experience, citizenship, race, creed, belief, color, national origin, sex, age, handicap, or political affiliations. By policy, RSVP Workstations are required to conform to all relevant civil rights and non-discrimination statutes, including the Equal Employment Opportunity Act (EEOC) and the Americans with Disabilities Act (ADA). The Area VI RSVP has a policy that prohibits staff and volunteers to participate in partisan and non-partisan electoral activities, voter registration, transportation of voters to the polls and lobbying for legislation while representing RSVP

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or RSVP membership. In addition, RSVP staff will not refer volunteers or accept timesheets for these activities. These requirements are reiterated during the site sign up process and in the RSVP Handbook given to all sites and volunteers.

Station Oversight

Program staff follow up on submitted timesheets. They often visit stations and make phone calls to stations to confirm volunteer service activities. Many volunteers personally drop off timesheets which provides a time to check in and make sure that their job is what was described by the site job description. Visits by staff are made to evaluate accessibility and facility safety.

Managing community change

Our experience is that every organization has people who believe in and value their mission. Thus we hesitate to approach any site or volunteer with the thought that their work is not a community priority since every organization contributes to the economic health and quality of life of the community. So we do not anticipate that it will be necessary to graduate stations. While some stations fit only under Other Community Priorities, most all of our volunteers work at multiple jobs so that they will be counted with the identified focus areas rather than in the community priority group. In addition, many volunteers help with capacity building at sites that otherwise do not fit the national performance measures.

Community meetings and Advisory Council meetings provide an opportunity to emphasize the new priorities and identify ways to increase volunteer impact in these areas. A recent community survey found that Services to Support Seniors and Veterans are important throughout the service area; this influenced our choice of the Primary Focus Area for this grant.

Organizational Experience in Primary Focus Area

Since 1977 the sponsor has managed a variety of services for people over 55 in five Western Montana Counties and the Flathead Reservation. The sponsor carries out functions related to advocacy, planning, coordination, inter-agency linkages, information sharing, brokering, monitoring and evaluation to assist older persons in leading independent lives. The sponsor manages \$221,000 in state funding and over \$1,137,000 of federal funding.

The sponsor has sponsored the Foster Grandparent Program since 2000 and the RSVP program since

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2002. There are volunteers working with Long Term Care Ombudsmen, Information and Referral services, and the State Health Insurance Assistance Program (SHIP). The sponsor supervises 14 contractors providing nutritional, homemaker, home chore, transportation, and legal assistance services. Senior Independence has been the primary work plan for Area VI RSVP over the last 12 years; seniors kept at home, improved quality of life, and improved nutrition are areas that have been tracked by RSVP sites and RSVP has always met all performance measures in work plans.

Management of Program Compliance

Data collection and program evaluation is gathered annually from sites and volunteers using surveys with specific questions related to performance measures. Staff conduct annual in house reviews of station folders and the database, checking MOU dates, signatures and job descriptions. Throughout the year volunteers and sites are contacted for feedback on the volunteer, the job, and the impact. At least one or more annual meetings of community groups assess both program performance, impact on needs, and suggestions on how to expand and/or improve the program. The Advisory Council meets 3 times a year to review program progress, review the budget, and respond to input from community group meetings; these meetings are scheduled and facilitated by the sponsor. The Advisory Council is made up of senior representatives and county officials from each of the counties served by the sponsor. The Program Director reviews goals and objectives quarterly, modifying the work process to achieve outcomes. An annual retreat for staff reviews successes and shortcomings, plans for improvement, reviews the RSVP Self Assessment Checklist and the status of performance achievement. Since age is the primary requirement for volunteers, applications are not accepted without birthdays that reflect that the individual is 55+ and copies are made of driver licenses. All volunteers are checked on the National Sex Offender Public Website before placement at a site.

Organizational Capability

Program and Fiscal Oversight

The program has an experienced director who has been in compliance with biennial program audits by the CNCS state office for over 10 years. The director monitors CNCS requirements and policies for the RSVP Program are already in place; new policies are developed as changes are made by CNCS. Quarterly reports on the programmatic elements are made to the sponsor Board. There are rotating community meetings (each in a different county) to review the program and how it is helping meet community needs. Reports from these meetings are presented to the Advisory Board.

The sponsor bookkeeper has worked with federal grants for over 12 years and maintains records of

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federal, non-federal, in-kind, and excess income and expenses. All expenses are approved by the RSVP director and reviewed by the sponsor. The sponsor Executive Director monitors all fiscal matters and the Board of Directors regularly reviews the RSVP budget. Income and expenses are recorded by the bookkeeper, who generates financial reports, including a percent used to track spending trends. In-kind is documented on forms signed by donors and the program director. Expenses are documented with invoices or receipts and a cover sheet with type of expense and budgeted line item. Income is tracked as in-kind, federal cash, non-federal cash, or non-federal excess. Volunteer timesheets are collected quarterly and reviewed by a trained volunteer and a staff coordinator. Hours are entered into a dedicated database. Sheets to document inputs and impacts will be provided, as appropriate, to sites, clients, and volunteers and collected when a job ends, a volunteer moves from the assignment and/or at times relevant to reporting requirements.

Staffing

The Area VI organizational chart defines staff roles and each employee has a well defined job description. Sharon Bladen: Full time RSVP program director since 2003. She built the RSVP program from 135 volunteers (2,350 hours) in FY 03 to 449 volunteers (71,576 hours) in FY2014. In 2010 she successfully wrote a PNS expansion of RSVP into 2 new counties. These counties are very rural but the volunteer program is steadily growing. Responsibilities include: Program Implementation and Documentation of Inputs and Impact and writing grant renewals and Progress Reports.

Four part time volunteer coordinators (one in each county) are the primary contact for volunteers and sites. These coordinators are part time, but do not work in any other capacity for the sponsor. Montana counties are very large geographically and each area has its own persona and issues making a local coordinator much more effective in understanding and recruiting volunteers to solve community problems than a single coordinator could ever accomplish.

Internal Policies

The sponsor has a Personnel Policy Manual with written policies and procedures including but not limited to Equal Employment, Immigration Law Compliance, Disability Accommodation, Whistleblower Protection, Conflicts of Interest, Background Checks, Probation Period, Benefits, Job Descriptions, Overtime, Timekeeping, Performance Evaluations, Confidentiality, Attendance, Disciplinary Action, Dispute Resolution, Drug and Alcohol Use, Sexual Harassment, Jury Duty, Travel

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Reimbursement, Payroll Procedures, Smoking, Internet Usage and Social Media. Policies for the RSVP Program are already in place including policies for Background checks, Volunteer separation from service, Grievance Procedures, Record Keeping, Travel Reimbursement, Prohibited Activities, Policy for volunteers on the state offender list, , Equal Employment and Americans with Disabilities Compliance. Policies are developed and reviewed by the sponsor that establish compliance with federal regulations as needed.

Management of capital assets

The sponsor has a Procurement policy and a Property and Supplies policy. The bookkeeper maintains records of capital equipment and computers including date of purchase, source of funds, cost, and serial numbers. There are very few items that fall under the \$5000+ capital equipment definition. Lists of nonexpendable items purchased are also kept on file.

Fiscal Management and Experience with Federal Grants

The sponsor employs a fiscal administrator/bookkeeper who is responsible for fiscal accountability, systems management, staff timesheets, payroll, and general ledger functions. The Executive Director reviews these functions at regular intervals. Financial data is maintained in an accounting program and backed up to an off-site server. The agency director and bookkeeper have extensive experience in financial management and federal grants including the FGP and RSVP grants for over 12 years. The agency is in compliance with Federal reporting for Older Americans Act programs and undergoes an A133 audit annually.

Other

N/A

PNS Amendment (if applicable)

N/A