

# Narratives

## Executive Summary

RSVP of Greater Long Beach, sponsored for 41 years by the Long Beach Alpert Jewish Community Center (AJCC), will utilize the skills and experience of 565 senior volunteers to provide services that address identified community needs that have been determined by local community partners, state and national studies. Service activities will include a primary focus in Healthy Futures, supporting Aging in Place services for older adults in the service area, while also providing services that enhance the community well-being.

400 volunteers (71%) will serve in Healthy Futures. Activities will include providing: food delivery, education, well checks and social support to older adults that are isolated and homebound, access to affordable nutrition, companionship for veterans and also isolated, disabled, or homebound seniors, referrals, support services to seniors, elder abuse prevention and transportation services.

Annually, over 1725 unduplicated seniors will be provided support, services and education that enable them to age in place while still contributing to the community.

The CNCS investment of \$69,454 will be supplemented by \$44,972 of support from local and sponsor contributions. Once granted CNCS funding for FY 2015-2018, AJCC and the RSVP of Greater Long Beach will seek additional fiscal support to enhance and support the volunteer experience and program operations.

## Strengthening Communities

The service area for the RSVP of Greater Long Beach encompasses 13 cities in south Los Angeles County that have a population that range from 10%-15% of older adults per 2010 US Census reports. These cities include Artesia, Bellflower, Carson, Cerritos, Compton, Gardena, Lakewood, Long Beach, San Pedro, Signal Hill, Paramount, Wilmington and Willowbrook. Based on the 2010 Census estimate, approximately 1,150,000 live in the RSVP service area, representing about 10.66% of the total Los Angeles county population. The racial diversity has changed significantly since the 2000 census, reflecting a decrease in the white population with a surge in the Hispanic and Asian populations. As the census reflects the older adult population identified as 65-plus, the ramifications of the 55- plus statistic are dramatic as agencies prepare for future programming both in culturally sensitive and age appropriate services, in an environment of shrinking resources for older adults.

## Narratives

The current census indicates the racial/ethnic makeup of the RSVP service area: 39% White, 44% Hispanic, 15% Asian and 16% African-American, with many reporting numbers as racially mixed. Our service area includes a large Cambodian community (some unreported) and significant numbers of Japanese and Hispanic individuals. Whites remain the largest group of older people, in the census of 65-plus. But growth in the 55-plus population between 2000 and 2010, there has been a significant rise in Asian, an increase of 74% and Hispanics at 73%. This compares with only an 18% growth for older whites and 34% for older blacks.

According to the LA County Seniors Count report, more than 13% of the people living in SPA 8 (LA County) are age 65 or older. Recent studies by the Associated Press indicate the annual rise in adults age 55 and older is particularly pronounced. An intensive study, "LA County Seniors Count, Survey of the Older Adult Population" conducted by LA County Area Agency on Aging states that "one third of all Americans reached age 50 in 2010 and the US population age 65 and older will double within the next 25 years" (National Institute on Aging, 2006)

Education and income vary greatly; some of our service cities reflect both higher levels of income and service cities that have a high percentage of minority populations reflecting extremely low income levels. The range of educational levels varies from no high school diploma to post degree education. The LA County Area Agency on Aging reports that, as of 2004 (the latest report published), 10% of the population lived below the Federal Poverty Level; of those living below the poverty level in LA County as a whole, more than 11% are age 65 and above.

All service cities provide services, programs and activities that serve older adults, many with culturally sensitive programming, but with shrinking funding, these services are diminishing. Many of our partner agencies provide services specific to the local cultures, embracing and supporting those of other ethnic descent. The City of San Pedro has a high population of Hispanics and most all programming is provided in Spanish while the city of Gardena has a strong representation of Japanese seniors and offers not only programming in their language, they offer meals that are based in Japanese culture. To meet the specific cultural needs of each RSVP service area, our volunteer roster reflects those cultures.

## Narratives

The connection of social support to morbidity and mortality is well-documented in research. Higher levels of social connection and engagement are associated with decreased levels of heart attacks, lower cancer occurrences and lower risks for a number of co-morbidities upper respiratory illness, depression and cognitive decline, to name a few (Cohen & Lemay, in press). Social support also has been found to help individuals make healthy behavioral changes (Cohen & Lemay, in press). Almost one-third (29%) of the older residents surveyed reported isolation as problematic and expressed the desire for more social activity and connection. As described by CNCS, twenty years of medical research has established a strong connection between social ties and/or perceived social support and positive mental and physical health outcomes. Put simply, researchers believe that positive social ties and feeling that support is available can help individuals be and remain physically and mentally healthy. The contact with RSVP volunteers doing meal services can address both the nutritional (physical) and social connections (mental) needed for good health. The healthier people are, the more likely they are to remain living in their own homes.

To address the Primary Focus area of Healthy Futures, RSVP is confident that providing service in Aging in Place is the greatest community need, based on national, state, and local community studies. The RSVP Director has been involved for over 30 years in developing programs for the aging community and has been a member/founder or facilitator for many local community groups and research planners. Some of these local research based studies include: The Strategic Plan for Older Adults published by the Health and Human Services Dept. of Long Beach, which after a two year study, determined that Aging in Place, Community Engagement, Safety, Transportation and Quality of Life were of utmost importance and often lacking resources for our aging population. This study and findings led to the development of a coalition of service providers in Congresswoman L. Sanchez's district (all part of the RSVP service cities) working with all cities to clarify the greater community needs and what gaps in services existed and recommendations to address the concerns and needs. Again, all findings indicated a lack of resources to meet the current needs of Aging in Place and even less available as the boomers age.

According to the California Senate Select Committee on Aging, California's current aging and long-term care system does not provide for person-centered, individualized care or easy transitions between programs. The likelihood of becoming disabled in two or more activities of daily living (ADLs) or of developing cognitive impairment is 68% among those 65 and older, meaning that almost 7 out of 10

## Narratives

seniors will have substantial needs for supportive care. California was once a leader in providing services to support the full integration of seniors and persons with disabilities into community life. Despite these initial advancements, the long-term care system has been negatively impacted by system fragmentation, lack of system wide data or planning, capacity issues, and fiscal pressures.

The RSVP director also sits on the Advisory Council of CSULB's development of a senior VILLAGE, which would address the study issued by the Committee on Aging cited above. If granted, CSULB will be funded by the Archstone Foundation to implement programs and services for the aging population. RSVP volunteers are included in the plan, to serve with Social Work, Gerontology and Nursing students, providing resources, health services, education, companionship, and crisis management. According to Dr. White, head of the Gerontology Dept., early findings indicate the need for the VILLAGE concept as a strategy to address unmet needs and the growing future needs.

In 2013, RSVP conducted a study with a Masters student of Gerontology to evaluate the needs of seniors and transportation. Of over 400 surveyed, almost 60% indicated they had no knowledge of alternative transportation, or what they would do when they could no longer drive. In this process, community leaders worked with RSVP to develop the Older Adult Transportation Taskforce (OATT) to develop strategies, partnerships, and changes to address this growing need, of not only affordable and accessible transportation, but also to develop an educational component on transportation options for the Greater Long Beach area. RSVP also works with F.A.M.E., Inc. of Los Angeles to provide taxi vouchers and bus tokens for qualified RSVP volunteers and seniors in our service area, all processed by RSVP volunteers.

RSVP also co-authored research and reports with community partners to build the Elder Abuse Prevention Team (EAPT). RSVP is now a board member and facilitator with this group. The director also sits on numerous board (one senior housing facility) and coalitions of senior service providers to ensure that RSVP has current and relevant data to monitor changing and current needs of our senior population. The Long Beach Nonprofit Partnership, serving the Greater Long Beach area, published their yearlong study findings of 417 nonprofit agencies in June 2014. One study looked at the contribution of volunteers to agencies attaining their mission and vision and found that in 417 agencies, they showed support of 120,000 volunteers, contributing 4.9 million hours, 565 of these volunteers serving with RSVP, building the strength and capacity of each nonprofit agency

## Narratives

The County of Los Angeles AAA conducted a needs survey county wide of our seniors "Seniors Count" and their findings agreed with local findings on the needs of seniors, agreeing that there are serious deficiencies in available services for our older adults, of most importance the need for more services to support older adults maintaining an independent lifestyle.

On February 16, 2014, Ian Sample of The Guardian wrote the article, "Loneliness Twice as Unhealthy as Obesity". In it he states that researchers found that the feelings of isolation can have a devastating impact on older people. Compared with the average person in the study, those who reported being lonely had a 14% greater risk of dying. This figure means that loneliness has around twice the impact on an early death as obesity. Poverty increased the risk of an early death by 19%.

In the primary focus of Healthy Futures, 150 volunteers will serve in meal delivery to the homebound and disabled, providing not only quality nutrition and decreased isolation, but also a daily well check, guaranteeing the safety and well-being of each client, meeting our outcomes in our primary focus area. 50 volunteers will provide companionship to seniors of our community, decreasing their perception of isolation. 20 volunteers will prevent elder abuse through social contact, visits, observation, protection & intervention service. 15 volunteers will serve in transportation services, offering education, resources and access, removing the isolation component for those with no other aid. To aid seniors in maintain their independence, 90 volunteers will provide services for free or affordable food. Companionship and peer support through service with 75 volunteer vets provides a compassionate environment for service.

RSVP will ensure the data collection and the management of the measurement of outcomes and outputs through the utilization of RSVP Reporter, the Memorandum of Understanding (MOU), CNCS trainings, working with the state program specialists to ensure that all work plans conform to requirements. The director will maintain ongoing positive relationships with volunteer managers at stations partnering in this initiative, along with the director's 23 years experience in providing accurate, CNCS approved and timely reports required, will ensure compliance of all federal regulations. RSVP will utilize the CNCS Knowledge Network to acquire approved surveys and reporting techniques to accurately portray the valuable work conducted by our volunteers in the field of Aging in Place. Using our annual MOU renewal process, station supervisors will be trained to

## Narratives

capture and report required data from volunteers and clients. Ongoing conversations and visits will be critical to maintaining close working relationships with each station to monitor changes in programs, clients and willingness to gather data annually. All data will be collected prior to the end of each grant cycle to guarantee timely submittal to RSVP and time to collate all information for all CNCS required reporting.

To address the service activity of veterans in Healthy Futures, RSVP will work with our partner station, the SS Lane Victory, a WWI I ship, rebuilt solely by volunteers, that also served in Korea and Vietnam, to provide opportunities for the service of veterans and their peers. This service activity directly decreases isolation and provides service in a way that feels secure to this population, utilizing their skills and knowledge in an environment that is comfortable, welcoming, and understands the unique characteristics and issues of veterans that have served in all branches of the military. It also serves as a place that young vets can learn, serve and communicate with vets from WWI I, Korean and Vietnam eras. These older vets can provide insight and understanding to vets returning home some with symptoms of PTSD and related diagnosis. "What returning or wounded vets don't need is sympathy. They need to be treated like the men/women they are: equals, heroes, and people who still have tremendous value for society" (Chis Kyle, Former Navy SEAL and Author). Many of the older vets are now providing training to a newly attached division of Sea Cadets, giving the adolescents a chance for intergenerational learning experiences. With a common goal of maintaining a sea worthy ship, vets of all ages can serve in assignments that look and feel familiar, while having the opportunity to socialize and share past experiences and frustrations that often plague vets, as non-vets may not be able to relate to many of the issues that vets experience and may not be comfortable sharing in other environments or with non-vets. The socialization & companionship for the older vet increases with every task accomplished and conversation held. Many of those serving on the Lane Victory have no other familial or friend connections as they are aging in an era of dying vets. The friendships and working relationships extend far greater than just shipboard duties, they often become the primary and only social connections left, frequently with younger vets providing support.

In addition to service activities on The SS Lane Victory , RSVP co-sponsors an annual event with mental health agencies and veteran organizations to serve vets as well as provide resources and connections to community services. This event is staffed and attended by RSVP volunteers, Advisory Council and many of our partner agencies. RSVP uses this platform as a recruitment event of veterans

## Narratives

looking to serve, as well as educational for volunteers and vets.

### Recruitment and Development

Volunteer assignments are designed and created to aid volunteers in exploring and developing new skills, a must to attract the younger senior. Boomers are more interested in this aspect of serving than the previous generation, as they demand stimulating, challenging, and often leadership positions. Working with our stations to provide these challenging opportunities requires frequent interactions to aid them in assignment creation, meant to aid in their retention efforts. Stations are also trained on how to recruit and refer eligible volunteers to RSVP for the benefits of insurance and travel reimbursement.

RSVP is recreating a new corps of volunteers that will serve in stations who also promote Aging in Place. We are currently in a transition as we explore new partners for our volunteers that address the Aging in Place initiative, as well as disengaging from stations that are no longer in the primary focus areas. Our current partners represent a wide variety of service options in social services, law enforcement, senior services, safety, education, and health care. Through our on-going contacts with the stations we reinforce the importance of offering meaningful jobs for volunteers of all ages, particularly those of the Boomer generation.

Along with Long Beach Nonprofit Partnership, RSVP has co-sponsored the Volunteer Village for the last 12 years, a "one stop shop" for linking potential volunteers with agencies looking only for volunteers. We also partner annually with Big Sunday and The Jewish Federation, for a local Day of Service activity, as a major tool for recruitment of new volunteers as well as service. We also sponsor and create opportunities for service on national service days, both 9/11 and MLK. After event evaluations show a high level of satisfaction with the day of service activity, and a desire to serve on a more ongoing basis.

RSVP staff, volunteers and Advisory Council will utilize public speaking at local senior residences, senior centers and other places where potential volunteers congregate as a recruitment tool. Staff and Advisory Council also represent RSVP at least monthly at a variety of community health and resource events to conduct peer recruitment, our most effective tool. Media articles are frequently utilized to highlight the volunteer, creating another form of recruitment.

## **Narratives**

The RSVP Director works with each new volunteer to explore possible assignments in their community and exploration of new areas of interest, building leadership skills, planning for new projects, and specialized positions that will meet the needs of the homebound/disabled senior. A follow up with each newly placed volunteers after one month of service to ensure satisfaction with the new assignment.

RSVP believes that training volunteers to 1) understand & monitor for elder abuse, 2) know what community resources are available, and 3) how to educate seniors on issues and concerns that support aging in place is critical to providing volunteers the needed skills and knowledge that will serve them in the field of Aging in Place. The RSVP director, a social worker, currently provides training and support to our volunteers that work with homebound/isolated or disabled adults in areas of social services, aging issues, transportation options, resources and elder abuse. These trainings ensure that our volunteers can provide needed support to their clients, while understanding the myriad of issues that may face the isolated and disabled. These trainings are evaluated by the attendees to guarantee that they are getting the information needed to successfully provide quality services. Volunteers in direct contact with homebound seniors, after trained, are "mandated reporters" in cases of suspected abuse.

The Older Adult Director of LA County Dept. of Mental Health will begin monthly specialized trainings for our Senior Police Partners (SPP's) on mental health issues of seniors beginning in October 2014. These volunteers are often the front line after a police call out for a senior. Combined with their elder abuse trainings, this mental health training will assist the SPP's in evaluating proper referrals and intervention. After the pilot phase is over (3-6 months) we hope to include volunteers from other agencies that serve isolated and homebound seniors, engaged in service activities that promote Aging in Place.

Strategies to increase RSVP support and value, for volunteers and partner stations, include providing notification and access to community and educationally based trainings to ensure their knowledge & skills are increased. RSVP will also provide education, documents and studies to volunteers and stations that demonstrate the added value of remaining active and engaged, the impact their personal health and well-being of remaining engaged through newsletters, website, email blasts and speaking at senior & community events.

## **Narratives**

Before being accepted as a "volunteer station", RSVP emphasizes the importance of providing a high quality experience for the volunteers, including building new skills, understanding the mission and vision of the agency (through orientation or 1:1 experiences), developing leadership potential, understanding the meaning of their service to the agency and the community and the impact of their service, while enhancing the quality of their own lives. Volunteer managers are encouraged to attend the monthly meeting of the Volunteer Managers Roundtable, held each month at the RSVP building to share and learn best practices in the field of volunteer management. Trainings for station supervisors also occurs at the monthly Director of Volunteers meetings, during station visits as annual MoU's are updated, and when new stations are enrolled. One major resource of capacity building training for our partner stations is LBNP, whose primary mission is to support nonprofits in the Greater Long Beach area.

Providing stations specific examples of how they can assure a high quality experience for their volunteers - such as emphasizing the importance of providing assignments that meet the needs and interests of the volunteers rather than just the needs of the agency, providing variety, interesting and challenging assignments, being as flexible as possible in their scheduling, and providing appropriate volunteer recognition - as well as implementation tools and guidance for doing so.

RSVP will seek feedback from volunteers during Days of Service, through conversations, evaluations and surveys, at least once each year, regarding their perceived success of the assigned station in providing high quality experiences. Our annual survey is provided to volunteers to ensure they are being utilized correctly, meeting community needs, and satisfied with their assignment.

In addition, the project will offer a bi-annual orientation to prospective and new RSVP volunteers, offering information about how to make the most out of their volunteer experience, as well as educating them about the volunteer opportunities available to them in the community. The RSVP Director will follow up these group sessions with individual sessions with each volunteer, to help ensure the best possible match and preparing the volunteers to develop within the selected assignment. Appreciation of the service learning component of the RSVP volunteer experience will also be emphasized in both group and individual sessions.

## **Narratives**

This project area is culturally diverse, which is reflected by both those who serve and the programs offered to meet the specific cultural needs of these distinct populations. RSVP seeks to bring together people of diverse backgrounds -- both volunteers and clients. Volunteer and assignment diversity is sought across many dimensions, including: age, race, culture, religion, sexual orientation, health, socio-economic background, education and abilities/disabilities. The composition of volunteers represent various socio-economic backgrounds, religious belief systems, educational levels, and physical abilities, and serve with agencies/clients of various backgrounds and ages, often serving clients of different race, education and income. RSVP does not use income levels as a screening tool. Our MOU provides clear guidance to ensure inclusion.

Our service population is a mix of many ethnicities and volunteers serve in a wide variety of culturally diverse roles. All volunteer stations serve people of diverse backgrounds. The city of Long Beach is seeing a rise in the Latino and Asian senior population and RSVP will work to provide volunteers to agencies that provide culturally appropriate programs. The programs in San Pedro serve a strong Hispanic population, utilizing volunteers that are able to communicate in the native language. The city of Gardena has a high population of first generation Japanese residents. Most volunteers in Gardena sites are able to converse in Japanese or provide translation for those who need it.

In addition to attracting a diversified volunteer base, RSVP programs seek to serve a diversified clientele. Volunteers serve in city and private nonprofit programs that represent the service area in diversity, health, disabilities, incomes, ages, sexual orientation, languages, and religion. Specific requests/needs of agencies dictate the volunteer recruitment strategies;

Annual recognition events are held annually and are sponsored by local businesses to demonstrate community wide appreciation for the contributions of our volunteers. In addition to the annual event, volunteers are recognized for their service with letters of appreciation throughout the year, and on birthdays and special events. Notes of condolence are sent if the volunteer has had a recent loss of family or spouse. Knowing that ongoing communication makes each volunteer feel supported and valued. Site visits are also valuable in talking with individual volunteers as well as having them show the director what they are doing to contribute to the mission and vision of their volunteer agency, again providing a connection to RSVP to volunteers who rarely come to the RSVP office. Media coverage of individual volunteers has been a huge success this year with a reporter of the Press

## Narratives

Telegram who has adopted community service highlights for his bi-weekly column. His column provides insight to both volunteers and the agencies they serve.

### Program Management

Volunteer stations are recruited, selected and supported if RSVP can be shown that their volunteers will address CNCS initiatives and local community needs, provide staff support and supervise volunteers. Memorandums of Understanding (MOU's) established between sponsor and the volunteer stations describing the roles and responsibilities of each party are approved for no more than three-year periods and can be amended as changes occur. Site visits are conducted annually but most are visited several times per year to maintain relationships and to assess both volunteer and station satisfaction. Prior to renewal of each MOU, RSVP reviews current data from each station, their support of RSVP in the last year, opportunities for growth and support of volunteers, and national initiatives to determine a continued relationship. We have found that the data we are requesting is often info that the agency needs for their internal reporting or adds another layer of impact reporting for them. Volunteer stations are also provided the Volunteer Handbook that also has station guidelines at the beginning of each partnership and each renewal, provided so supervisors are familiar with all volunteer operations and their role in ensuring compliance with federal requirements, defining prohibited activities. Volunteers are only placed in approved agencies with a signed MOU.

To further guarantee compliance with the federal regulations regarding accessibility and volunteer stations, RSVP utilized the skills of a CSULB student intern who provided new insight and research in an annual review of RSVP in FY 12/13. This included an intensive study of accessibility of stations, with the assistance and support of the UCLA Tarjan Center which addressed both physical and programmatic components of each partner agency. Maintaining compliance in accessibility, RSVP, housed in the AJCC, is located on a bus line for access by people without a car. Per city code, adequate handicapped parking is available, and to better serve those with limited abilities, elevators are available and easily accessible. Additionally, prior to completing the MOU, all stations are evaluated for ADA compliance and 99% have been certified as accessible per national standards.

The Advisory Council and staff conducts an annual assessment of project performance to assure all goals and objectives are met and demonstrate results that indicate high quality assignments and impact are attained through:

1. Review of volunteer satisfaction through surveys and 1:1 interviews;
2. Review of project accomplishments and impact on identified needs and problems of the community

## Narratives

through station surveys stations; 3. Project self-assessment conducted by the Advisory Council to determine program strengths and weaknesses; and 4. Station evaluations to determine impact of volunteer service.

The annual assessment of project accomplishments and impact on the community and/or client population is shared in summary form with key RSVP volunteers acting as council to the project, sponsoring agency Board of Directors, stations and volunteers through RSVP mailings, and CNCS through the year-end reports.

Our sponsor organization has a 41 year history of maintaining full compliance with CNCS standards, evident in annual reports and through all monitoring visits throughout the years. We have been successful in managing all other grants received. Our success in meeting Performance Measures is reflected in our record of CNCS compliance. AJCC has maintained, supported and "grown" the RSVP program since 1973, establishing decades of success and experience with RSVP. AJCC has continued to increase support of the program since inception, and places high value and support to RSVP and the community.

To address the need of graduating volunteers and stations not in primary focus area, we have gradually dropped stations over the past year, as we focused on massing our volunteers to meet the needs of our community and CNCS initiatives. RSVP has begun informing and educating volunteers, stations, community and politicians of the future of RSVP; the changes of the competition and the fact that AJCC may or may not be awarded the grant. Once we have been notified of our grant status, site visits, letters e-mails and/or phone calls will be made to RSVP participants. If awarded, volunteers and stations will have the opportunity to transfer to performance measure output/outcome based assignments, all new stations will sign a revised MOU which addresses jobs and assignments, reporting documents, and federal compliance. If the MOU is not signed, volunteers will be given notice that they are no longer an RSVP volunteer and volunteers will no longer be placed at those stations.

It is expected that many volunteers will age out of the RSVP program. Additionally, as another strategy for graduating volunteers and stations, volunteers will be notified in spring 2015 that travel reimbursement will be provided only to volunteers that serve in Primary Focus areas. Volunteers that

## **Narratives**

choose not to serve in focus areas may fit in Other Community Priorities or will be offered referrals to agencies directly, provided a list of area agencies, referred to our Director of Volunteers group or the Volunteer Center. As Independent Living/Aging in Place has been a focal point for RSVP for over 12 years, we expect our relationship with many of our current partners to continue, while growing to meet increasing needs. RSVP has a successful history of measuring for performance based programming, as evidenced by the approval and acceptance of reports submitted to CNCS. As part of our MOU process, all stations have been receptive to the changing requests for new methods of measuring volunteer contributions and impact on community. All continue to participate in the collection and submittal of required data.

RSVP Advisory Council members receive training across many dimensions. At Advisory Council meetings, presentations, guest speakers, and the Director presents all pertinent information to keep members abreast of issues. RSVP staff visit sites twice a year, Advisory Council members assist follow-up on random visits to assure that non-discrimination in the operation of its program on the basis of race, color, national origin, including individuals with limited English proficiency, sex, age, political affiliation, religion, or the basis of disability of the participant is a qualified individual with a disability. The volunteer station maintains program activities to which RSVP volunteers are assigned accessible to persons with disabilities including mobility, hearing, vision, mental cognitive impairments and/or limited English language proficiency and provide reasonable accommodations to allow persons with disabilities to participate in programs and activities. Both stations and RSVP volunteers are not allowed to conduct or engage in religious, sectarian or political activities. Prior to acceptance in RSVP, all volunteers submit proof of age (55+) as required by CNCS.

To ensure that volunteers understand their role and responsibilities to RSVP, volunteers are provided 1:1 orientation to RSVP with the director at the first interview. Once accepting their assignment, they are provided an overview of the agency they have chosen to serve and a RSVP Volunteer Handbook is provided to the volunteer with discussion to clarify primary points that ensure compliance with CNCS regulations as well as specific issues that relate to data collection and submittal of timesheets, travel reimbursement, service restrictions, insurance coverage, safety and accessibility.

### **Organizational Capability**

JEFFREY RIPS, AJCC Executive Director, came to the AJCC in July 2008; first as the Director of Membership Services and Facility Operations, and then in 2013 became the 6th Executive Director of

## **Narratives**

the AJCC. Prior to coming to the AJCC, he was the Executive Director of the Hillel Foundation of Orange County for 10 ½ years. In this role, he was responsible for staff, fund raising, board development, strategic planning, community relations and programs and services. In this capacity, he worked with a variety of grants and programming to meet community needs, both for the Jewish population and the greater campus community at large.

Previously, he was the Director for Youth/Teen/Family and Camp services for the JCC of Orange County, California. This position included direct interaction with youth and teens and creating programs and services to meet their needs. He also was in charge of staff development and supervised year-round and summer youth, camp and teen programs staff.

Jeff holds a degree of Bachelors of Science from California State University, Long Beach. The move from Director of Membership Services and Facility Operations to Executive Director at the AJCC was based on not only his advanced skills in management but also his high level of ethics and values that have contributed greatly in the ongoing and increasing success of the programs and operations in the AJCC. Mr. Rips works in close partnership with the Executive Directors of the Jewish Federation and Jewish Family and Children's Services, creating a strong leadership that has created an atmosphere of unity, strength and strong leadership.

DIANE JOHNSON, RSVP Project Director, has served in this capacity since June 1993, with a successful record in operating a high quality RSVP program. Diane is responsible for all operational aspects of RSVP with input and oversight by AJCC Executive Director, AJCC Board of Directors, Advisory Council and AJCC Controller. Diane has helped agencies develop some of RSVP's "flagship" programs; Senior Police Partners, Fire Ambassadors, and OATT. She is actively involved in strategic planning and advocacy efforts for older adults, sits on numerous task forces and committees related to aging and the community. She sits on the Board of the Agencies and Programs on Aging, Fed Towers Senior Housing, Elder Abuse Prevention Team Board member, Older Adult Transportation Task Force founder and chair, is a member of the CSULB Advisory Council VILLAGE, founder of the Director of Volunteers roundtable, and is currently on the Mayors Senior Advisory Commission of Long Beach. Previously she worked as Program Director for the YWCA of the Harbor Area, developing programs and services that served women and their families, for infants, preschools, after school programs, summer youth programs, teens and women of all ages. Her prior experiences included: Director of the

## **Narratives**

Family Shelter for Homeless, Director of Social Services for the elderly population served by Volunteers of America and as case manager for the elderly and homebound population. She holds a Bachelors of Science in Social Work, with Gerontology as her major, and has earned a Masters in Organizational Management. She has successfully maintained and grown the program in total compliance with the ever changing CNCS initiatives and requirements.

ULISES SAM: AJCC Controller: Mr. Sam oversees the financial operations at AJCC since January 2011. He is responsible for producing annual budgets, preparing monthly financial statement, and managing the accounting department. The accounting office tracks, maintains and generates the fiscal reports for all grants received by the organization.

Mr. Sam has over 20 year of accounting experience in the non-profit and private sector, most recently as Controller of a national governing body. He is a graduate of Pepperdine University and received his MBA at Chapman University.

Communication between AJCC department directors is guaranteed through 1:1 supervision meetings and bi-weekly staff meetings; for updates, assessment of programs and activities, future planning, trainings/in-services, and interaction with the fiscal department. The Executive Director and key project staff meet monthly with the AJCC Board. Board committees meet throughout the month for management, fiscal, program development, human resources, fund development and strategic planning. Staff receives a monthly fiscal report from the accounting dept. for reconciliation and approval.

The AJCC Controller oversees an accounting office with 4 staff, a Human Resources specialist and qualified volunteers with specific skills in accounting. From time to time, these staff resources are supplemented by contractual, short-term accounting assists. Annual audits are prepared by an outside contractor.

Actively supporting and continually working to grow RSVP, key administrative staff; the Executive Director, CFO and Board members, remain a strong resource for RSVP. Prior to any grant report submittal, the Executive Director reviews and interacts with RSVP to ensure compliance and understanding of data, also sharing with the Board any program changes and successes.

## **Narratives**

The AJCC has an annual operating budget of \$5 million, a balanced budget annually, with close to 150 employees, and has been serving all ages of the Greater Long Beach Community for more than 60 years. The AJCC has a membership of over 2000 families, including a large population of older adults. The organization's infrastructure includes a Human Resource professional as well as a Board-level Committee that oversee the personnel policies and procedures. The Budget and Finance Committee, headed by the Treasurer of the Board of Directors, reviews and approves financial statements every other month. The Treasurer and Controller present financial information to the Board of Directors and to the Executive Committee at each of their regularly scheduled monthly meetings. Monthly transaction reports of expenditures of accounting are provided to RSVP Director, to monitor expenses in an efficient and timely manner.

There are administrative policies and procedures (Handbook) in place addressing various matters such as business travel, reimbursement for business expenses, background check requirements for both employees working with our large children programs and with older adults, etc. An approval and documentation process is in place for disbursements. The Department Directors work closely with the Finance department in handling, processing and reconciling of check requests and purchase requisitions. A request, approval and documentation process is in place under the CFO and Executive Director who work closely with accounting staff in handling, processing and reconciling of check requests and purchase requisitions. All transactions require at least two signatures, with larger amounts requiring administrative approval. Checks are prepared by the sponsoring agency's accounting department and signed by only the Executive Director and designated Board members.

The organization employs a half time Human Resources Director, backed by a Board-level Human Resources Committee who provide oversight in updating job descriptions, performance appraisals, recruitment and personnel/payroll management support. All new hires to the AJCC must go through the HR department, and meet all AJCC requirements, including background checks compliant to the individual department. All hires must be approved by HR, Executive Director and department head.

The AJCC uses Sage accounting software, a fund accounting program designed for non-profit organizations. ADP is contracted to process payroll. The agency is audited by independent auditors each year and is not subject to the A-133 audit. The Audit and the Budget and Finance Committees review financial procedures and reporting on an ongoing basis. The Budget and Finance Committee,

## **Narratives**

headed by the Treasurer of the Board of Directors, reviews and approves financial statements every other month. The Treasurer and Controller present financial information to the Board of Directors and to the Executive Committee at each of their regularly scheduled monthly meetings. All RSVP financial records are subject to annual review by the sponsoring agency, audited annually and are recorded every six months on the Federal Financial Report which is submitted to CNCS by the Controller after approval by the Executive Director and RSVP. AJCC maintains an agency wide balanced budget, while successfully managing federal grant funds for the RSVP project since 1973.

Operating policies specific to RSVP are found in the RSVP Operation Handbook which have policies and procedures that address staff and sponsor responsibilities, background checks, copy of the Volunteer Handbook, processing of volunteers, orientation and supervision of volunteers, how stations are developed and maintained through the MOU, instructions on how and who process timesheets, expenditures, grievance policies, restrictions of volunteer activities, discrimination rules, templates of all forms generated by RSVP, and all other operational aspects of RSVP.

### **Other**

N/A

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

N/A