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Executive Summary

The Tri-County Retired Senior Volunteer Program (RSVP) is sponsored by the Rocky Mountain Development Council, Inc., a non-profit 501(c) (3) human resource development council serving Montana since 1965. An estimated 325 volunteers will serve in RSVP. They will provide over 32,500 hours of volunteer service valued at \$22.55 an hour or \$732,875 (Independent Sector, Federal Value).

The primary focus area of this project is Healthy Futures: Aging in Place. The anticipated outcome, at the end of the three-year grant period, is for 742 homebound individuals, older adults or individuals with disabilities to have increased social ties and/or perceived social support. Other focus area efforts will provide economic opportunity activities for veterans and military families, Income Tax preparation for economically-disadvantaged persons and aid in environmental stewardship. Community priorities will be addressed by a large workforce of volunteers, paired with a diverse range of secular or faith-based private non-profit or proprietary health care organizations and public agencies. The CNCS federal investment of \$41,413 will be supplemented by \$ 38,051 of non-federal resources.

Strengthening Communities

Description of Community

The Tri-County Retired Senior Volunteer Program (RSVP) has been serving Broadwater, Jefferson and Lewis & Clark Counties for the last 42 years. Since 1972 the program has been sponsored by The Rocky Mountain Development Council, Inc., (RMDC) a non-profit 501(c) (3) human resource development council. RSVP is based in Helena, the Montana State capitol. The combined land in the three county service area is 6,308 square miles and is predominantly rural in nature. The total population served by the project is 82,542 persons. The RSVP service area also includes the unincorporated, rural areas of Lincoln and Augusta and the incorporated towns of Boulder, East Helena, Townsend and Whitehall.

The three counties have an average per capital income of \$27,294. Approximately 9% of the combined population of these counties is under the poverty level and 13.1% are non-institutionalized persons with disabilities (2013 Montana Update to US Census).

The service area has a senior population, 65 and older, of 18% or approximately 14,857. There is an

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expectation of a 112% increase in Montana residents, age 65 and older, from 2013 to 2030 with the fastest growing segment over the age of 85 years (Economic and Demographic Information -- Montana State). Veteran populations in the service area total 8,945 with an estimated 1,381 over the age of 65. Much of the project area is located in isolated rural communities over an hour's drive from the nearest full-service hospitals located in Helena (St. Peters Community Hospital and Fort Harrison VA Hospital).

The geology of the area is a combination of rugged mountains leveling off to flat plains, common to the terrain found in similar parts of the Rocky Mountain Eastern Front. A cold-climate zone, temperatures can plunge to 35 degrees below zero in the winter along with frequent snow and ice. Many rural county roads are unpaved gravel.

Primary Focus Area

Healthy Futures (Aging in Place)

The Healthy Futures, Aging in Place focus area best represents the historical services of RSVP, its current mission and vision for the future.

Within the service population, 18% are seniors and half of them are living below the poverty level; 13.1% are non-institutionalized persons with disabilities. These homebound or older adults and individuals with disabilities are at high risk for losing their ability to live independently and many suffer from food insecurity.

RSVP service activities in the Healthy Futures, Aging in Place, focus area are driven by achieving results outlined in National Performance Measure outputs or outcomes -- the number of homebound or older adults and individuals with disabilities who reported having increased social ties / perceived social support.

RSVP has in place, thirteen stations, including approximately 130 unduplicated volunteers that are involved in food delivery and companionship. These stations are: Area IV Agency on Aging, Augusta Senior Center, Broadwater Health Center, Eagle Manor Residences, Food Share, Inc., Helena Senior Corps, Lincoln Senior Center, Montana Talking Book Library, Rocky Mountain Development Council (RMDC) Blood Pressure Clinic, RMDC Meals on Wheels, RMDC Foot Clinic, St. Peter's Hospital and

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the Whitehall Senior Center. Volunteers at these stations prepare and/or deliver meals and food boxes to homebound seniors and disabled persons. They also provide companionship in the form of home visits, escort to medical appointments and wellness clinics, resource coordination and phone contact.

Volunteers track the time that is spent on activities in a log or timesheet. Each station has a representative that works closely with their volunteers and the RSVP staff to ensure that volunteer and client-served hours are recorded, reviewed and submitted for data collection into the RSVP Volunteer Reporter database (VRD).

Minimum dosage requirements for receipt of food delivery is 6 deliveries per year. Deliveries are recorded on a form provided by the stations to their volunteers and then submitted to RSVP for entry into the VRD. Minimum dosage requirements for companionship are 6 volunteer interface hours annually, tracked on a form provided by the stations to their volunteers and submitted to RSVP for entry into the VRD. Each individual that receives the minimum dosage from either or both services is counted once. Quality control for dosage data collection comes from monthly review of data by RSVP staff.

RSVP has protocol and infrastructure to support data collection and ensure National Performance Measure outcomes and outputs are measured, collected, and managed. Work stations compile information and data, sharing this information with RSVP as per signed Memorandum of Understanding with each individual station. Volunteer time sheets with the verification/signature of the station representative will be on file at the RSVP office. Information and data will be regularly recorded in the Volunteer Reporter database (VRD). Annually, service recipients receive a survey to assess their experience with the program. All files will be kept in secured file cabinets. Keys are held by the Program Coordinator and Director. Strict confidentiality will be maintained by RSVP staff.

RSVP work plans logically connect four major elements in the Primary Focus Area: Community needs identified, service activities that will be carried out by RSVP volunteers, instrument description and data collection plans (including target numbers that lead to outcomes or outputs appropriate for the total number of volunteers assigned). Work plans align with National Performance Measure instructions. Approximately 40% of unduplicated volunteers will be placed in assignments that address our primary focus area, Healthy Futures: Aging in Place. 30% of unduplicated volunteers will be

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placed in the community priorities work plan and the remainder of unduplicated volunteers will be placed in volunteer activities aligned with the Corporation for National Community Service (CNCS) agency-wide outputs. Primary focus area activities (food delivery and companionship) increase the ability of seniors and disabled persons to retain their independence, preserve their assets and avoid or delay placement in a nursing home or other assisted living facilities. Receiving the benefit of a meal delivery or a food box and the availability of companionship, increases social ties and perceived social support for these individuals, outcomes of National Performance Measures.

Primary Focus Area and Veterans/Military Families

15% of the veteran population in the service area is over the age of 65. There are many cross-over components of activities for the veteran population that appear in both the RSVP primary focus area of Healthy Futures and in the following "Other" focus area: Veterans and Military Families (Served). Under the auspice of Healthy Futures, homebound, elderly or disabled veterans will receive food and companionship services that will be monitored and tracked with the same mechanisms. Services for veterans and military families are addressed below.

Other Focus Areas

Veterans and Military Families (Served)

RSVP volunteers will work with 200 members of active military families stationed on or near Fort Henry Harrison. Fort Harrison comprises 8,000 acres within the Tri-County RSVP service area. The Fort is home to the Montana National Guard's Joint Forces Headquarters, 95th Troop Command and 208th Regional Training Institute.

Military families are in need of services and skills to impact their quality of life, improve their family strength and make transitions into, and out of, the Tri-County area. Without help, these families are at greater risk for the turmoil and dysfunction that accompanies frequent moving and uprooting.

RSVP volunteers support their needs for economic opportunity with four stations and 57 unduplicated volunteers. Stations involved are: The Montana Military Museum, Montana National Guard Family Programs, National Guard Thrift Store and the Fort Harrison VA Center. A sample of services and activities provided by the volunteers at these stations include: Coordination of needs during pre-deployment, deployment and reintegration; develop opportunities for professional certification,

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licensure or other credentials and assisting with access to employment benefits and services.

All stations maintain time reports and/or activity logs that keep an unduplicated count of family members that have received services, each member receiving a count of "1". These reports will be collected and verified by the station representative and will be provided to an RSVP staff member for tracking in VRD.

Economic Opportunity (Financial Literacy)

According to the 2014 Montana Update of the 2010 Census, 9% of the Tri-County RSVP service area is living below the poverty level. These economically disadvantaged individuals are in need of Income Tax preparation assistance.

Without this assistance, low-income families may be unaware of tax incentives that are allowed them by the Federal and State governments like earned income credits. Elderly and disabled individuals may be overwhelmed by the complexity of the tax preparation process and simply not submit them.

Providing tax preparation services for these income-challenged persons will lead to National Performance Measurement outputs for increased financial literacy services. Program target numbers for these services is 150 individuals or families.

Volunteers will track the number of persons receiving these services and their station representative will give these reports to RSVP for entry into the VRD.

Environmental Stewardship

The Rocky Mountain Eastern Front is a pristine environment characterized by vast areas of public lands. Brian Martin, Regional Ecologist for The Montana Nature Conservancy says that it is virtually "impossible" for existing public trails to be maintained by the limited Forest Service staff.

Without assistance from community volunteers, many of the access trails through public lands would be closed due to dangerous conditions from fallen trees, washouts or noxious weed infestation.

Located near Lincoln, a rural portion of the project service area, is a large tract of Forest Service lands.

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Formerly a logging community, Lincoln has been economically distressed since the collapse of the timber industry. A dedicated group of 24 volunteers from Lincoln use hand tools and mechanical equipment to create, repair and maintain over 200 miles of trails used by year-round recreationalists. They control the noxious weed population, remove trash and improve the at-risk ecosystem.

Volunteers will track the hours they work on their project and also the miles of improved trails. These records will be verified by the station representative and given to RSVP staff for input into the VRD.

Community Priorities

RSVP considers community involvement, at all levels, to be of utmost importance. It is a United Way Agency and cooperates with 33 other human resource agencies in developing plans for addressing community needs. It also collaborates with like-minded organizations to leverage the impact of its volunteer workforce and share resources.

According to Brian Johnson, Lewis & Clark United Way Director, "Many of the United Way agencies do not have enough manpower to carry out their missions without the assistance of the Tri-County RSVP program".

Without the volunteer workforce coordinated by RSVP, essential services provided to economically disadvantaged individuals and families would be limited, delayed or even terminated. Ten RSVP stations and 98 volunteers are dedicated to these community priorities. These stations are: American Red Cross Blood Services; Helena Area Chamber of Commerce; Helena School District; Helena Symphony; Lewis & Clark Library; MT. Historical Society; Lewis & Clark County United Way; RMDC Wellness Clinics; Upper Blackfoot Historical Society and the Whitehall Country Store.

These community priority jobs offer a wide-array of choices for volunteerism. They provide an opportunity for seniors to partake in service and meet local needs. They empower people 55 and older to contribute to their communities through service and enhance their own lives as well as the lives of those they meet.

Volunteers attached to community priority activities track their time on timesheets which are collected and verified by the station representative. These are turned over to RSVP staff and entered

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into the VRD.

Recruitment and Development

Approximately one quarter of RSVP volunteers currently enrolled are under the age of 70 and have professional backgrounds. The program must meet their expectations for quality volunteer experience.

RSVP has executed Memorandum of Understandings (MOU's) with 29 stations (public agencies, secular or faith-based private non-profit organizations or proprietary healthcare organizations). These stations engage volunteers with enriching and fulfilling opportunities for community service and help address the critical needs of the community.

Volunteers assist programs such as St. Peter's Hospital and their new Keeping You Home Program, developed in partnership with RSVP through a 2-year, CNCS funded pilot program. This cutting-edge, primary focus area program allows volunteers the ability to meet with newly-discharged patients', asses their home environment and provide them with critical resource information which will contribute to the success of their home recovery, thereby reducing the hospital recidivism rate. Interesting opportunities like these not only allow volunteers to share their experiences, abilities and skills, but improve the community and themselves.

To maintain this pool of skilled volunteers, RSVP has developed a tiered training curriculum specific to the job type. Volunteers in the Keeping You Home Program are required to attend a one month training program, taught by RSVP and hospital staff, that educates them in the areas of HIPAA, environmental assessment, medical protocol and resource coordination. The base-line training for all project volunteers occurs during their acceptance and orientation to the program.

Each prospective RSVP volunteer goes through a screening process to validate their eligibility. If accepted, RSVP staff discuss, with all new volunteers, their needs and desires so that placement is appropriate. When they are placed with a specific station, the station representative is responsible for training them for their particular duties. Duties are clearly defined with a written job description, available to the volunteer, the station and RSVP.

The Tri-County RSVP resident population is 95.3% white, closely split between male and female, with a senior citizen percentage of 18% and a veteran population of 11%. This large amount of seniors and

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veterans creates dual capacity, for assistance but also for volunteerism. That portion of the senior community that enjoys good health is willing and able to volunteer. They are recruited by RSVP staff at various speaking engagements, health fairs, and independent-living, planned communities. The program sponsor, RMDC, has a large senior community center which provides congregate meals, activities, trips and numerous membership benefits. This is a rich environment for volunteer cultivation.

Fort Harrison is home to a VA hospital and to one unit of the Montana Air National Guard and the Blackhorse Division of the Montana Army National Guard. The families of these reservists are a good source of volunteers. RSVP receives a high-level of recognition from the military community by having four stations on the Fort Harrison complex. These stations serve the military community and their families and become self-promoting platforms for volunteer recruitment.

RSVP also recruits with an eye to cultural and social diversity in order to offer our volunteers and service-recipients a chance to meet people from other walks of life. Though the Tri-County Native American population is relatively small (2%), it does represent the largest minority group. RSVP annually assists with The Last Chance Pow Wow and other Helena Indian Alliance activities.

The program actively searches and secures volunteer opportunities for individuals who are disabled.

For example, the Helena Chamber of Commerce station utilize non-ambulatory volunteers for working at the Visitor Center all summer long.

RSVP provides recognition and encourages stations to recognize our volunteers. Events such as the RSVP annual recognition luncheon, various picnics and individual town celebrations insure that our volunteers know they are appreciated. Each of the volunteers receives an annual birthday card and a pin representing their years of service. Individuals and groups of volunteers are honored for outstanding service in the RMDC senior newspaper, The Voice of Experience.

RSVP has maintained an ample, reliable and steadfast volunteer workforce for the last 4+ decades and plans to sustain that body into the future by having frequent attention and contact with our individual volunteers and station representatives. It will also use local media, community events and the United

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Way Volunteer Up, online volunteer registration system, to attract new volunteers.

Program Management

Tri-County RSVP will retain approximately 325 (unduplicated) volunteers who will contribute at least 32,500 hours of volunteer service per year. Each station will operate in compliance with RSVP regulations. To ensure this compliance, stations will execute a MOU with RSVP that states the expectations, regulations and requirements for the partnership. A sample of those provisions are: Providing job descriptions, supervising volunteers on assignments, validating timesheets, investigate and report on any accidents, inappropriate activities and non-discrimination. MOU's will be reviewed every year and if in compliance, renewed every 3 years. RSVP staff will have frequent contact with station representatives to maintain an open line of communications and will visit each station at least once a year to observe operations and volunteer activity.

Each station will have job descriptions that clearly identify the duties assigned to their jobs. Every volunteer will have a job description. The job descriptions for each station will be reviewed by staff at the annual station visit to verify accuracy. The jobs are entered into the VRD and the volunteer hours are recorded at the job level. Volunteers will be reminded through training opportunities and written communications to notify the RSVP staff if they are being asked to do duties that are not on their job descriptions or if they are no longer able to perform their volunteer duties.

RSVP also works diligently to ensure that the project office and staff are in compliance with the RSVP federal regulations. The office is readily accessible and maintains standard working hours. Policies are in place to address all requirements of RSVP regulations.

The stations currently affiliated with RSVP fit well into the proposed Healthy Futures primary focus area and will require no graduation of activity. There will be no disruption to current volunteers as the recent historical focus of RSVP has been in the Healthy Futures arena.

Our track record for Healthy Futures activities is impressive, 40% of station partnerships were developed with an eye toward providing services like food delivery and companionship for homebound or older adults and individuals with disabilities.

As recipients of a special 2-year CNCS grant a year ago, RSVP developed a program that matches

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recently discharged hospital patients with a volunteer community resource coordinator. That coordinator assesses the home environment of the patient and determines what types of resources could make the home recovery/ rehabilitation process more successful. This grant study has received national recognition and has been nominated for the 2014 Innovation Award by the American Hospital Association.

Measuring our performance in the aforementioned special grant was accomplished by creating a detailed data gathering process, supported by surveys and assessments, and managed with specialized software programs.

RSVP undergoes a compliance and monitoring assessment by the Montana State CNCS office every three years. The last assessment verified that the program meets compliance with RSVP federal regulations. Samplings included verification that volunteers were being placed in stations that have a signed MOU and that volunteers were eligible for assignment.

RSVP has an Advisory Council, made up of a wide spectrum of community representatives, knowledgeable about human and social needs of the community and competent in the field of community service and volunteerism. They conduct an annual survey of stakeholders, assessing the effectiveness of the program and help the project meet its administrative and program responsibilities. They also assist in fundraising, publicity and programming for impact. They are knowledgeable regarding the capability of older adults and are of a diverse composition that reflects the demographics of RSVP's service area.

Organizational Capability

Rocky Mountain Development, Inc., the RSVP sponsor, operates for the purpose of serving senior citizens and low income families and individuals in Lewis and Clark, Broadway and Jefferson counties. In fiscal year 2013, RMDC responsibly facilitated the use of over 6 million dollars in federal grants to achieve the goals of the organization and its community.

The financial software package, Sage Accounting Systems, has been used by RMDC since 2004 and provides effective management of Payroll, Accounts Receivable, Accounts Payable and the General Ledger. In-kind activity is also tracked in this system. The RMDC financial administrator is a certified public accountant and has a five member staff. The financial audits for RMDC have received

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unqualified opinions for the last three years.

Since 1972 RMDC has provided program management for Tri-County RSVP program as well as physical space that is conveniently located with other senior programs. RMDC has a financial department staff member assigned to meet the grant management responsibilities for RSVP. The grant manager and project coordinator work cooperatively to ensure compliance with statutes, regulations and applicable ONB circulars, and to ensure accountability and effective use of available resources. For safeguard of federal resources, RMDC has proper segregation of duties which allows one person to enter documents into the accounting system while someone else reviews and approves these documents. These two staff also develop budgets, review each bill or invoice for proper coding, review staff time sheets and record in-kind/matching documents. The grants manager generates a monthly Statement of Operations and General Ledger statement that is reviewed by the project coordinator.

The RSVP Program Director is Linda Nolan. This is a part-time position, approved by the CNCS State Office. Ms. Nolan ensures that RSVP funding and interests are represented in the mix of Senior Corp projects in Helena, Montana. She reviews the annual budget and works with RMDC management to determine non-federal matching requirements. Melony Bruhn is the RSVP Assistant Director and Coordinator. This is a full-time position. Ms. Bruhn is responsible for the day-to-day operations of the project and for the accomplishment of the program objectives. Melissa Williams is the program Administrative Assistant. This is a full-time position, dependent on funding. Ms. Williams gives administrative support to the project.

This trio each has a job description that blends cooperatively with the others, providing joint leadership for RSVP program planning. They develop goals and objectives; asses operational practices, standards, available resources and community needs; write project plans and grant proposals; conduct research and reporting activities; compile statistics and conduct surveys as part of the performance measurement process. They are responsible for supervision of fiscal operations, support to volunteer stations and volunteers, as well as outreach, public relations, community networking, coordinating the various volunteer stations and ensuring that the program is addressing the needs of the community. Within the management structure, Linda Nolan answers directly to Julie A. Serstad, Executive Director for RMDC.

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The sponsor has an extensive array of internal policies and operating procedures to provide governance and manage risk, such as accounting, personnel management and purchasing. The RMDC financial department also manages the long and short-term decision-making processes for facilities and equipment in conjunction with its Board of Directors.

The combination of RMDC management and RSVP staff build an infrastructure that ensures a robust financial management capacity and high-level accountability for managing federal grants. RMDC has plans and systems for self-assessment, evaluation and continual improvement. Measurements of program out-come based work plans are tracked through various means with supporting documents available on request. Examples of measurement tools include surveys, letters of recommendation, participant sign-in sheets and service receipt logs.

Other

Other

N/A

PNS Amendment (if applicable)

P and A

N/A