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Executive Summary

An estimated 500 Retired and Senior Volunteer Program (RSVP) volunteers will serve through a network of at least 42 stations, including the American Red Cross; numerous Community and Senior Centers; Catholic Charities; Children's Museum of Stockton,; several Healthcare Facilities; several Law Enforcement and Fire Agencies; Ombudsman; and Energy and Weatherization Programs. The primary focus area of the proposed project is Healthy Futures. At the end of the three-year grant, 1,500 individuals will receive emergency food from food banks, food pantries, or other nonprofit organizations; 1,500 individuals will report increased household food security; 100 elderly and low income people will receive assistance in filing their Federal, State, and Local tax returns; 1,500 economically disadvantaged individuals will receive assistance through Volunteer Income Tax Assistance (VITA), financial literacy services and/or services to help prevent elder abuse; and 50 disadvantaged elementary school students will have improved academic performance in literacy and/or math. Some of their activities will include providing companionship and, delivering food to older adults; offering transportation to medical services and shopping areas; providing information on healthy nutrition decreasing obesity and increasing physical activity by safely transporting youths to local parks and lakes for recreational activities; offering financial literacy education and assistance in filing tax returns; and tutoring elementary school students. San Joaquin County (SJC) RSVP volunteers will help fifty (50) veterans and economically disadvantaged and/or military students as well as relationships to help provide veterans with assistance accessing affordable housing. In order to identify veterans needing services, SJC RSVP will reach out to the SJC Veteran's Services Department; the SJC HUD-VASH program (HUD-Veterans Affairs Supportive Housing program which combines Housing Choice Voucher (HCV) rental assistance for homeless Veterans with case management and clinical services provided by the VA); the Disabled American Veterans (DAV) Charities of SJC; and the five American Legion posts and two VFW posts within SJC. The CNCS federal investment of \$48,938 will be supplemented by more than 60% of non-federal resources in the amount of \$73,106 from San Joaquin County RSVP.

Strengthening Communities

San Joaquin County (SJC) is one of eight counties that make up California's San Joaquin Valley, which was hit hard in the recent recession, and SJC fared worse than the state average on many measures of economic distress. SJC earned a nation-wide reputation for its high number of home foreclosures, and as of March 2013, 22% of all homes were in some stage of foreclosure compared to

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the state rate of 14% and national rate of 12%. The unemployment rate in SJC was 11.7 percent in April 2014, compared with 7.3 percent for California and 5.9 percent for the nation during the same period. Median household income, at \$53,764, is considerably lower than that of the state (\$61,632).

SJC's population has grown steadily for many years, going from 563,598 in 2000 to 685,306 in 2010 (U.S. Census) to 710,731 today (California Department of Finance). SJC's age 65+ population grew by 19% between 2000 and 2010. Currently just over 10% (or 71,181 people) of the population is 65 or older. Fifty-three percent of the 65+ residents live in the Stockton metropolitan areas, while 27% live in the unincorporated areas of the county. Of all county residents 65 or older, 31.4% speak a language other than English at home, 29.9% never earned a high school diploma, and just 16.1% achieved a bachelor's degree or higher. Over 40% in the labor force of 276,220 have some type of disability. Although only 9.6% of 65+ residents have annual incomes below the Federal Poverty Level (FPL), 46% (over 28,000) do not have enough income to meet their most basic needs as measured by the California Elder Index. Another 24,000 elders, or 39%, fall into the "eligibility gap," with incomes that do not cover their most basic needs but are too high to qualify for many public assistance programs. For 61% of SJC residents who are 65 or older, their rent represents 30% or more of their annual household income. In California, older adults who rent their residence need twice the FPL to meet survival-level living expenses.

County Health Ranking and Roadmaps (CHRR), a collaboration between the Robert Wood Johnson Foundation and the University of Wisconsin Population Health Institute, ranks SJC 52nd out of all 58 California counties for positive health behaviors. According to the California Department of Public Health, out of 58 counties in California in 2013 SJC had the 6th highest death rate for diabetes, the 13th highest coronary heart disease death rate and the 13th highest stroke-related death rate. The 2009 California Health Interview Survey, which provides health-related data from all 58 counties in the state, found that only 28.6% of SJC adults engage in moderate physical activity 5 days per week and 30 minutes per day, and just 44.9% report eating five or more servings of fruit/vegetables daily. In some areas of SJC, nearly 46% of adults do not have health insurance. An estimated six million people nationally are projected to go without insurance protection and pay a penalty in 2016, according to an analysis last year by the Congressional Budget Office and Joint Committee on Taxation. Going without insurance is a risk that many people would rather not have.

According to CHRR, 28% of adults have inadequate social/emotional supports and 30% of SJC adults are obese. KidsData.com reports that 40.2% of SJC children are obese/overweight per the Centers for Disease Control and Prevention (CDC) definition. This finding is mirrored by the California

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Department of Education's Fitnessgram assessment, which demonstrates that just 65% of SJC children fall into a healthy weight zone. In 2009, SJC established a Central California Regional Obesity Prevention Program (CCROPP), with the goal of decreasing the incidence and prevalence of obesity, chronic disease, and the related risk factors through the combined and expanded effort of its members. Results indicated that soda consumption, a risk factor for obesity, is the highest amount in the county's 12-17 year olds when compared to other counties in California. This information has reinforced the need for non-traditional partnerships and prompted the goal of increased participation on the part of the private sector food outlets and retailers, as well as city and county planners, commissioners, and elected officials. Some of the partners include Healthy San Joaquin, University of the Pacific, Kaiser Stockton, Lodi and Stockton Unified School Districts, SJC Office of Education, Anthem Blue Cross, Health Plan of San Joaquin, Women/Infants/Children (WIC) and Human Services Agency (HSA). The Healthier SJC Community Assessment Collaborative, which was formed to complete the Community Needs Assessment mandated by the state, completed a county Health Needs Assessment in 2013. The list of priority health needs that emerged included: 1) lack of access to primary and preventative healthcare and dental care services; 2) limited cultural competence in health and related systems; 3) limited or no food security, nutrition literacy, or access to healthy and nutritious foods; 4) limited transportation options; and 5) lack of safe and affordable places to be active.

In 2012, SJC had a food insecurity rate of 17.9%; 56% of the 123,300 people with food insecurity had incomes below 130% of the FPL; 20% were at between 130% and 185% of FPL. The child food insecurity rate was 27.9%, with 74% of food insecure children living in families at or below 185% of FPL (Feeding America, Map the Meal Gap 2012). A recent report by the SJC Human Services Agency's CalFresh office indicated an 18.5% increase in households receiving CalFresh benefits from 2012 to 2013, a reflection of SJC's high poverty, foreclosure, and unemployment rates.

Public transit systems serve all the cities and unincorporated areas in SJC, but they do not meet all the transportation needs of residents. As the Regional Transportation Planning Agency, the San Joaquin Council of Governments regularly identifies the county's unmet transit needs, defined as "transportation services not currently provided to those residents, such as the elderly, the disabled, and people with limited means who use or would use public transportation regularly to meet their life expectations." In 2012-2013 the unmet transit needs identified included a need for increased frequency on existing routes, greater weekend and evening service, and reinstatement of former routes that have been canceled. However, SJC RSVP offers volunteer travel reimbursement for volunteers who need a

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little financial support while they are volunteering their services throughout the county.

Stockton's safety rating is rated at three out of a possible 100 points (100 being safe) by Neighborhoodscout.com Stockton has higher rates of violent crimes than those seen across the State and Nation. A person residing in Stockton is more than twice as likely to be a victim of property crime than the national average. In 2012, Forbes magazine moved Stockton to number 11 in its "America's Most Miserable Cities." While no definitive statistics conclusively prove the value of community, volunteer law enforcement activities, community enrollments, and citizen participation through law enforcement programs and improved sense of safety, are all valuable contributions to the community. Local community organizations need assistance with enhancing the lives of those who serve and those whom they service, and providing communities with valuable services. For example, the City of Stockton Volunteers in Police Services (VIPs) has a telephone reassurance program called YANA (You Are Not Alone); Museums need docents to guide tours, senior and community centers need helpers during special events, libraries need help with books, food distribution centers need help with collecting and packing food for community members in need and local agencies need assistance with clerical support.

Many SJC children live in communities that present an overall risk to their academic achievement. The primary family risk factor is poverty--children living in poverty are more likely to have a developmental delay, lack social skills appropriate for the classroom, perform poorly on standardized tests, repeat a grade in school, and drop out of high school (Jensen, 2009; Brooks Gunn & Duncan, 1997). Nearly a quarter (21.6 percent) of SJC families with children under the age of eighteen have incomes below the FPL, and well over half of the county's children--63.6 percent--are eligible to receive free/reduced price lunches at school. The percent of SJC four-year-olds living in neighborhoods where the schools' Academic Performance Index scores are from 1‐3 (out of a possible 10) is nearly twice that of the state of California (American Institutes for Research (AIR) Early Learning Systems, 2010). The high rate of SJC children living in neighborhoods with "very low-performing schools puts SJC in the bottom quarter of counties in the state for academic performance" (AIR). Many children in SJC do not have the opportunity to attend preschool or participate in a high quality early learning program as recommended by the National Institute for Early Education Research (NIEER). SJC ranks 49th out of California's 58 counties in the percentage of all preschool aged children enrolled in publicly funded programs. As a result, many children are not prepared for school when they enter kindergarten. Lack of success often results. SJC has a high school cohort dropout rate of 12.3 percent (2012-13 school year), compared with an 11.6 percent rate for the state;

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the county's high school graduation rate is just 80%. More than 23% of SJC students are classified by the California Department of Education as "English Language Learners," often an impediment to success in school. In addition, just 32%, the lowest percentage of any California county, of students in SJC feel connected to their school (Children Now).

According to the SJC District Attorney, fraud and economic crimes, especially tax refund scams, are on the rise in SJC. In fact, the District Attorney's Office publishes monthly Fraud Alerts and has a dedicated Elder Abuse Fraud line. According to a new survey by the Investor Protection Trust and Investment Protection Institute, nearly 8 in 10 seniors are vulnerable to investment fraud and financial exploitation as they tend to be home more often and are more isolated from family and friends; they tend to be more trusting, more easily intimidated, and many seniors have a substantial amount of savings they use to supplement their retired living. The experts surveyed identified programs delivered through senior centers and other facilities catering to older Americans as financial literacy programs best tailored to the financial needs of older Americans and their families or caregivers. The SJC Human Services Agency's Aging and Community Services Bureau (ACSB) is the local sponsor for the county's Retired and Senior Volunteer Program (SJC RSVP) and accepts the responsibility for assignment and supervision of RSVP volunteers at health, education, and social service related settings such as multi-purpose centers and health care agencies.

In 2012, SJC RSVP distributed a Needs Assessment Survey to more than 500 volunteers, volunteer station managers, and community members. A concentrated effort was made to distribute surveys to individuals in the county who were not already receiving services. The survey covered four major areas: demographics; senior nutrition; caregiver needs; and general community needs. Three major concerns were identified: personal finance and meeting future financial needs; continuing to live independently; and being safe in the neighborhood. The concerns identified by the caregiver population were limited transportation, lack of help in locating services, and need for assistance with different types of paperwork.

SJC RSVP uses Programming for Impact (PFI) as its programming framework, developing objectives based on community needs. After identifying and prioritizing community needs, SJC RSVP developed volunteer service activities that respond to those needs. In the Healthy Futures focus area, for example, food insecurity has been identified as a serious community need. Adults who are food insecure have poorer health and are at increased risk of depression and poor mental health, as well as chronic diseases such as diabetes and hypertension, and food insecurity among children has been linked to negative academic outcomes (UCLA Center for Health Policy Research, 2012). Some seniors

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face unique barriers to accessing nutritious food, such as decreased mobility, fixed incomes, health issues, or specific dietary needs. Programs that provide food resources that can be distributed directly to senior households are critical in helping to ensure that low-income seniors can access the nutrition they need (Hunger in America, a 2014 report from Feeding America). SJC RSVP has developed service activities that help low-income, elderly and disabled people access free or low-cost food regularly at local senior and community centers through food distribution programs such as Meals on Wheels, Brown Bag, Commodity Food distribution, and others. Volunteers serve from six to forty-five hours per month at one or more of 20 community/senior centers. According to the U.S. Administration on Aging (2000), community/senior centers are "both the first and the foremost source of vital community-based social and nutritional supports that help older Americans remain independent in their communities." SJC RSVP volunteers also assist individuals who are unable to leave their personal residences due to disability, injury, or age. Their services may include food deliveries to the residence, nutrition information, and transportation. These RSVP volunteer activities lead to National Performance Measures including H8: the number of homebound or older adults and individuals with disabilities receiving food, transportation, or other services that allow them to live independently; H9: the number that report increased social ties/perceived social support; H10: the number of individuals receiving emergency food from food banks, food pantries, or other nonprofit organizations; and H12: the number that report increased food security of themselves and their children (household food security).

RSVP partners with national projects to enhance services found in the SJC community. In the area of financial literacy, SJC RSVP annually screens volunteers for interest in the Volunteer Income Tax Assistance (VITA) program. VITA volunteers provide low-income households and seniors with access to free income tax assistance without the cost typically associated with tax preparation. They also inform taxpayers about special tax credits for which they may qualify, such as the Earned Income Tax Credit and Credit for the Elderly or the Disabled. Through the VITA program, community members often are able to receive tax credits and thus improve their overall financial outlook. In 2011, 2,515 individuals received tax refunds through assistance from VITA Programs, which brought more than \$2.6 million dollars into the local economy (Healthier San Joaquin, 2011). Volunteers also participate in Seniors Against Investment Fraud (SAIF) and the California State Long-Term Care Ombudsman Program. SAIF provides financial literacy education through outreach campaigns that educate and empower seniors on detecting, avoiding and stopping investment fraud, as well as providing information on what to do if victimized. The Ombudsman Program trains volunteers to

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help prevent Elder Abuse; volunteers serve as mediators, listening to and helping to resolve complaints that include financial, emotional and physical abuse. These RSVP volunteer activities lead directly to the National Performance Measure 01: the number of economically disadvantaged individuals receiving financial literacy services.

SJC RSVP has over 30 years of experience collecting and reporting consistently accurate data relating to RSVP National Performance measures. SJC RSVP is familiar with the reports required to fulfill the grant terms and conditions and regularly submits reports by the required deadlines. Data is thoroughly reviewed before it is submitted, and any errors are quickly corrected. The project's Work Plans and Performance Measures serve as blueprints and guide the systems that capture data for reporting; this ensures that the data measures what they are intended to measure. SJC RSVP has invested in a volunteer management software instrument called the Volunteer Reporter (VR), which offers an array of features that facilitate the creation of custom reports, spreadsheets, templates, mail merges, and volunteer profiles. Among features of the program is the VR Web Assistant database, which is used to store demographic data and statistics by station or volunteer. The database includes a skills bank, contact information, years of services, hours served, schedules, stations and jobs, reimbursements, time sheets, and placement history. With it SJC RSVP can generate mass mailing or custom reports by month, quarter, or year, post job opportunities on-line, accept applications from new volunteers, and receive hours from volunteer stations and existing volunteers. The VR Web Assistant database is used by RSVP to manage volunteer information and data, which is collected and recorded on a monthly basis. VR Web Assistant enables volunteers and station supervisors to sign in from home or work with a unique username and password. SJC RSVP collects and evaluates the data from Web Assistant monthly in order to monitor the impact of its volunteer programming; data collected include cumulative volunteer hours served during each budget year and number of individual RSVP volunteers who served during the reporting period. Each individual is counted only once during the program year. SJC RSVP utilizes tracking systems to record the number of individuals receiving service. For example, with regard to the Brown Bag Program, in which RSVP has twelve active volunteer stations, each station keeps detailed logs of the members, number of bags, and the average pounds per bag of distributed food. This data is obtained on a monthly basis in the form of the Brown Bag Recap Report. In the month of July 2014 over 2,800 members received 5,580 bags averaging 18.54 pounds per bag, with an estimated value of \$174,849 (Second Harvest Food Bank of San Joaquin & Stanislaus Counties).

SJC RSVP recruits veterans for volunteer opportunities, including opportunities that utilize their

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military experience, such as disaster response projects. Four current Advisory Council members and 75 current RSVP volunteers (15%) are veterans that are uniquely qualified to identify, recognize, and respond to the particular needs of fellow veterans and military families. SJC RSVP works to provide assistance to veterans with disabilities, veterans who are unemployed, and older veterans. For example, volunteers assist veterans at the Sharpe Army Depot in Lathrop, CA in completing their annual tax returns through the VITA program. SJC RSVP is developing veterans' assistance with agencies that assist with connectivity to Federal and state benefits, including college fee waivers, medical care, vocational rehabilitation, service and non-service disability claims, military record retrieval, life insurance and burial benefits. RSVP also is developing mentoring relationships between veterans and economically disadvantaged and/or military students as well as relationships to help provide veterans with assistance accessing affordable housing. In order to identify veterans needing services, SJC RSVP reaches out to its current volunteers and Advisory Council members who are veterans, the SJC Veterans' Services Department; the SJC HUD-VASH program (HUD-Veterans Affairs Supportive Housing program); the Disabled American Veterans Charities (DAVC) of SJC; and the five American Legion posts and two Veterans of Foreign Wars (VFW) posts within SJC.

Recruitment and Development

SJC RSVP strives to offer a high quality experience for volunteers that meets their desires, offers opportunities for them to grow with new skills, and develops their leadership potential. Efforts are made to provide volunteers, especially Baby Boomers, with volunteering opportunities that draw upon their talents, education, and experience and provide the kind of flexible, high-impact service they value. Partnering with high quality volunteer stations is essential and SJC RSVP ensures that the stations are safe and secure with adequate volunteer supervision. The ten members of the RSVP Advisory Council and the RSVP Coordinator work together to visit all volunteer stations annually to obtain firsthand information, update activities, ensure safety, and review RSVP policies and procedures with managers. SJC RSVP works with volunteer stations to integrate service-learning techniques, as appropriate, into training sessions and events that RSVP volunteers attend. Service-learning principles promote lifelong learning and encourage volunteers to build on life experiences and wisdom, validating their roles as change agents and community resources.

The RSVP Coordinator provides opportunities for RSVP volunteers to reflect on their volunteer experiences and apply insights to their service, advocacy roles, social issues and their own lives. She actively solicits comments and recommendations from volunteers and incorporates them into the project as applicable. She also employs a variety of reflection methods to facilitate learning and

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exchange that may include role-playing, role exchange or reversal, or group discussion; creates opportunities for volunteers to be active participants in reflection processes as facilitators or discussion leaders; applies reflection information to actively learn from the volunteers about their needs, requests, or concerns; and, applies reflection as a method to keep volunteers connected to one another and form a peer network that can be tapped for support, expertise and ideas. The RSVP Coordinator shares knowledge gained, successes, and lessons learned with other Senior Corps projects and colleagues to advance the state-of-the-art in service-learning with older adult volunteers.

SJC RSVP has a powerful training/orientation plan that is activated during the volunteer enrollment phase. The RSVP Coordinator meets with all new RSVP volunteers to provide an introduction to RSVP, the Corporation for National and Community Service, RSVP policies and procedures, and types of volunteer opportunities that the sponsor and volunteer stations offer. At these meetings the RSVP Coordinator provides the volunteers with a complete packet of information containing: 1) a locally-prepared volunteer handbook containing information about RSVP and the local sponsor as well a synopsis of regulations, policies and procedures, supplemental CIMA insurance, travel reimbursement, volunteer responsibilities, etc.; 2) an enrollment form with postage-paid return envelope; 3) online reporting procedures; 4) detailed information about CIMA insurance and other benefits of RSVP; 5) a sample timesheet; 6) a list of focus areas and related volunteer stations; and 7) a volunteer's Bill of Rights. She also provides an informational DVD that volunteers can watch at their leisure. After they are enrolled, new volunteers attend a separate orientation at the volunteer station where they will serve; it includes policies and procedures, and roles and responsibilities. RSVP volunteers also participate in periodic trainings conducted by the station (hours of training depend on the level of support required for the position). As an example, the Stockton Volunteers in Police Service (VIPs) attend a specialized academy that provides over 20 hours of enhanced training and skill development. This academy includes general traffic instruction, explains the roles of different divisions within the Police Department, and provides Community Emergency Response Team (CERT) training. During the academy, volunteers learn about their assignments and responsibilities, which include such things as assisting with graffiti and code violations and neighborhood sweeps. The RSVP Coordinator attends the academy as a guest speaker and helps with volunteer and station supervisor training. She provides training and technical assistance to both volunteers and volunteer station supervisors regarding monthly volunteer time and data reporting.

The residents of SJC are diverse consisting of the following demographic: 36% are White (not Hispanic or Latino); 40% are Hispanic or Latino; 16% are Asian; 8% are African American; 23% are

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foreign born; and 43% are naturalized U.S. citizens. Twenty-nine percent of those who are 18 years and older speak a language other than English at home. As of 2012, 36,138 veterans lived in SJC, 37% of whom were veterans of the war in Vietnam. Per the U.S. Census, 6.67% of the total SJC population ages 18-64 has disabilities/mobility limitations, and 10% of the residents are LGBT (lesbian, gay, bisexual, transsexual) according to an estimate by the San Joaquin Pride Center.

Recruitment of volunteers is ongoing; instruments used include VolunteerMatch.org, the County's own website, the Web Assistant, the RSVP handbook and flyers, presentations to community partners, and newspaper advertisements. The Record, Stockton's local newspaper, publishes recruitment information for RSVP on a regular basis in the Community Activities and Volunteer Opportunities section of the newspaper. SJC RSVP does not discriminate against any RSVP volunteer, or with respect to any activity or program, on the basis of race; color; national origin, including limited English proficiency; gender; sexual orientation; age; religion; or political affiliation; or on the basis of disability, if the volunteer with a disability is qualified to serve. Special efforts are made to recruit and place persons from minority groups, persons with disabilities, hard-to-reach populations, and community groups that are underrepresented in the project. Currently, 68% of RSVP volunteers are female and 32% are male; 8% are Hispanic; 7% are African American; 5% are Asian; 1% are Native American; 1% are Native Hawaiian; and 78% are White; 15% are military veterans; and 8% have some form of disability. Volunteer ages range from 55 to 85, with the average age being 74. SJC RSVP uses the following strategies in order to recruit and retain diverse volunteers: use of enrollment forms in multiple languages; advertising in a variety of ethnically diverse neighborhoods; advising volunteer stations on ways to ensure that volunteer opportunities are appealing and accessible to volunteers of varying cultures and physical abilities; promoting opportunities at outreach events and volunteer fairs throughout the County; outreaching to supportive housing programs, which serve a highly diverse population in terms of income levels, ethnicities, and physical abilities; and offering travel reimbursement so that the cost of transportation does not prohibit volunteering. SJC RSVP partners with stations such as the San Joaquin Pride Center and the Mexican Heritage Center that can be a source of volunteer referrals. In addition, the RSVP Coordinator serves on various boards and councils (e.g., the area LGBT Council) that enable her to provide information about and promote RSVP opportunities.

The RSVP Coordinator works to develop assignments that best meet community needs, strengthen the project, build volunteer station capacity, and also strengthen the volunteers' leadership skills. To the degree possible, assignments are matched to the interests, abilities, preferences, and availability of

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volunteers. Before becoming a member of RSVP, volunteers complete an enrollment form that helps determine their expertise and interests. Special efforts are made to find the kinds of activities sought by prospective volunteers, including current volunteers seeking a change in type of assignment and/or more challenging responsibilities. Volunteers may request being placed in a situation that would build their skills; for example, a volunteer that has work experience in a clerical field might want to volunteer in the crime prevention area. In that case, RSVP would link the volunteer to one of the three law enforcement agencies that currently have a Memorandum of Understanding (MOU) with RSVP. In addition to providing direct services to the community, there are several opportunities for volunteers to serve on County planning committees and provide their expertise in various areas related to community needs. Special consideration is given to developing assignments that allow for volunteers with limited physical strength and mobility or other disabilities to participate. Volunteers are never given an assignment that could place them at risk of personal harm. After assignments are identified, SJC RSVP provides each volunteer with a written volunteer job description that specifies the relevant needs of the community and the role and activities of the RSVP volunteer in delivering the needed services. The RSVP Coordinator ensures that RSVP volunteers are informed of key contacts and sources of assistance during their service. SJC RSVP administers a survey annually in order to determine satisfaction levels of the volunteers. Any issues or problems identified that may affect the retention of RSVP volunteers are promptly addressed. SJC RSVP does offer \$0.20 a mile up to \$20 per month to volunteers requesting mileage reimbursement.

SJC RSVP participants' average length of service is between three and five years. Retention is crucial to maintaining this vital corps of volunteers, and nearly 23% of the active SJC RSVP corps has been involved for more than 10 years; nearly 50% have been engaged for over five years. SJC RSVP recognizes, documents, and publicizes outstanding RSVP volunteer achievement. Informal recognition, such as listening to and acting upon recommendations by volunteers, offering honest praise, and providing assignments that are increasingly satisfying, is ongoing. An annual special event formally recognizes the RSVP volunteers. Certificates of appreciation go to members of the Advisory Council annually and are disseminated at Senior Awareness Day (SAD). SJC's 36th annual SAD celebration honored seniors in the community and provided information to increase awareness of many programs and services available to seniors throughout the county. The RSVP newsletter features and expresses appreciation for at least one volunteer in each publication. Recognition also goes to individuals who have completed special projects and worked the highest number of hours. RSVP occasionally recognizes specific individuals who have gone above and beyond what is normally

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expected of a volunteer; for example, as part of activities to raise awareness about Senior Corp Week, one volunteer received special recognition for his 27 years of volunteer service to low-income community members through RSVP. Another volunteer was nominated to participate in the 2014 California Senior Leadership Program (CSLP) offered by UC Berkeley School of Public Health because of her contributions to real and healthy aging. This volunteer has served 10,000 hours over the last eight years and was selected as one of 30 outstanding volunteers. CSLP was funded for the sixth time by the California Wellness Foundation, CSLP highlights the often unacknowledged role of older volunteers and activists in our community.

Program Management

The RSVP Coordinator is responsible for ensuring that all volunteer stations are public or non-profit private organizations, whether secular or faith-based, or an eligible proprietary health care agency that has the capacity to serve as a volunteer station. The formal process of volunteer station management is initiated through a Memorandum of Understanding (MOU) that describes expectations and formalizes the commitments of both organizations. Stations are expected to develop volunteer assignments that impact critical community needs; assign a staff person to be responsible for daily oversight of the placement of RSVP volunteers within the station; keep accurate records; comply with all applicable civil rights laws and regulations including reasonable accommodation for RSVP volunteers with disabilities; provide assigned volunteers with an orientation to the station and appropriate in-service training to enhance their performance; provide the necessary resources for volunteer performance of assignments; and supervise volunteers while they are on assignment. The MOU is signed by both organizations before any volunteer assignments occur.

After the MOU is ratified and volunteers are identified for service, a copy of each volunteer assignment is provided to the appropriate volunteer station. Prior to permitting RSVP volunteers to begin their assignments, the RSVP Coordinator works closely with volunteer stations to ensure that volunteers receive pre-service and ongoing training on safety issues; and works jointly with volunteer stations to assess, on a regular basis, safety issues related to RSVP service conditions and volunteer satisfaction. The RSVP Coordinator also provides orientations for volunteer stations and offers technical assistance regarding volunteer time reporting. That orientation includes a step-by-step process for reporting time over the Internet using the Volunteer Reporter (VR) Web Assistant. The RSVP Coordinator provides timesheets for both volunteers and stations. Volunteers can report their hours by submitting the hard copy individual timesheet, and both station managers and volunteers can report hours via VR Web Assistant. However, only one source per volunteer per monthly

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reporting is allowed, in order to prevent duplicate time reporting. The importance of reporting monthly volunteer time is stressed to both volunteers and station supervisors. The RSVP Coordinator reviews and approves all monthly volunteer and volunteer station reporting.

The RSVP Coordinator develops and regularly updates a catalog of forms to help with day-to-day volunteer organization management tasks and uses VR Web Assistant to track hours and assignments and run reports based on the data received from volunteer stations. The RSVP Coordinator maintains a file for each volunteer station containing a current signed MOU and a listing by name of all RSVP volunteers placed at the volunteer station. In order to formally assess station management, SJC RSVP staff use standardized forms that have been enhanced with site-specific information. Each station must complete the CNCS-developed RSVP Checklist for Accessibility, which covers building access, building corridors, restrooms, program areas, and program access; this form is completed only one time. Two checklists regarding stations are completed annually: 1) the CNCS-developed RSVP Station Visit checklist, which is completed during a site visit and covers information discussed, materials needed, agency, client, and volunteer information, and site characteristics; and 2) the SJC RSVP-developed Safety Checklist for Volunteer Stations, which ensures that partner agencies have safety guidelines and have assessed the safety of their volunteers. Volunteer stations managers also are asked to complete a staff assessment survey regarding the effectiveness of their staff. The RSVP Coordinator maintains contact and manages and monitors volunteer station activity in other ways, including technical assistance phone calls, an annual survey of volunteers designed to assess satisfaction, outcome of volunteer placement, and perceived levels of training and support; and site visits to meet staff and evaluate the quality of the volunteer station. She regularly assesses each volunteer station for compatibility with community needs, and graduates them if needed. If a station is graduated, the RSVP volunteers assigned to it are carefully matched to new assignments at other stations.

The RSVP Coordinator develops job descriptions specific to individual stations (to date, 171 have been developed and provided to stations) in order to help meet program management objectives and prevent volunteers from engaging in prohibited activities. Regular site visits by both SJC RSVP staff and Advisory Council members help to identify any prohibited activities that may be occurring. A three-meeting approach is implemented: At meeting one the Coordinator speaks with the volunteer privately to discuss the effects of their actions, remind them of their commitment and give them time to respond. A second meeting is held with those volunteers who are willing to correct their actions. At this meeting goals agreed to in the first meeting are reviewed and a third meeting is scheduled to review success in meeting those goals. At the third meeting volunteers are congratulated on their

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successes or, if they have not been successful, may be-relocated or asked to leave the program. Some volunteers may appreciate being afforded a graceful way to move on to some other assignment. This three-step method has been effective in correcting or otherwise eliminating negative volunteer behavior unrelated to fulfilling identified community needs.

SJC RSVP sometimes has volunteer stations that do not align with the proposed program design and current needs within the community. The volunteers associated with these stations are valuable assets and are offered service opportunities through other stations that are aligned. RSVP works to transform the non-aligned stations into sites where RSVP volunteer can perform capacity building service activities. Many non-profit organizations in SJC are in need of volunteers to build their capacity without which, they may not be able to increase, expand or enhance their services. With assistance from RSVP volunteers, organizations are better equipped to fulfill their missions and enhance their ability to have a positive impact on the community.

This year is the third year that SJC RSVP has focused on Healthy Futures. In the first two years the project met or exceeded all its Healthy Futures performance measure outcomes. Health needs being addressed include accessing health care, increasing physical activity, improving youth nutrition, and increasing senior's ability to remain in their own homes. Having served older adults from all economic levels and cultural backgrounds for over 30 years, HSA has earned the respect of and collaborated with a large number of programs involved with Healthy Futures, including the Community Blind Center; the Commodity Program; and the Courtyard, Escalon, Garden Acres, Kennedy, Larch Clover, Lathrop Community Centers, Lodi, LOEL, Manteca, Oak Park, St. Andrew's, Thornton and Woodbridge Community and Senior Centers. A number of these programs have become volunteer stations for SJC RSVP, including, the programs that provide food to seniors; by providing nutritious food, these programs, increase seniors' ability to remain in their own homes for as long as possible with the same or improved quality of life. RSVP also has partnered with St. Joseph's Interfaith Caregivers (SJIC) to improve community members' access to primary and preventive health care. RSVP volunteers provide transportation so that homebound residents can keep doctor's appointments and also participate in SJIC's friendly visitor program to ensure that homebound and non-ambulatory individuals have access to companionship.

In order to help increase physical activity among youths, improve youth nutrition, and reduce childhood obesity, SJC RSVP partners with the more than ten Community and Senior Centers located throughout SJC. After-school programs and a Summer Youth Enrichment Program (SYEP) has a focus on education but also provides nutritious food and outlets for recreational activities. Educational

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activities include working one-on-one with at-risk children to strengthen listening, reading, writing and comprehension skills. Some volunteers participate in the SYEP by transporting youths to water parks to swim and to local parks and lakes to play games and camp out. From April 1, 2013 to March 31, 2014, 262 volunteers at 20 volunteer stations provided over 20,811 hours, averaging 6.62 hours per month per volunteer toward activities relating to Healthy Futures.

In order to help increase supportive services for veterans, improve veteran nutrition, and reduce homelessness, SJC RSVP partners with Catholic Charities of Stockton, Red Cross, more than ten Community and Senior Centers located throughout SJC. Volunteer services range from responding to emergency needs for food, clothing, and shelter, referrals to counseling services (i.e., financial, legal, jobs, mental health), information on veterans cemeteries and burial benefits, and other resources that meet the unique needs of veterans and their families. Five SJC RSVP volunteers have identified themselves as volunteers with family in the military; three have identified themselves as volunteers in active military, and 75 have identified themselves as veterans. SJC RSVP will continue to provide services relating to veterans and military families.

For more than a decade SJC RSVP has had an active RSVP Advisory Council whose 10 members are active RSVP volunteers and are; knowledgeable about the needs of the community and the capability of older adults; competent in the field of community service and volunteerism; and capable of helping SJC RSVP meet its administrative and programmatic responsibilities including fund-raising, publicity and programming for impact. The RSVP Coordinator regularly attends monthly meetings of the Advisory Council and has established procedures for discussing and assessing project development, operations, accomplishments, and impact on the community. She also assesses and evaluates the effectiveness of the Advisory Council. Each Advisory Council member is provided with a list of volunteer station requirements and responsibilities, and the members and the Coordinator regularly reviews volunteer stations to assess whether or not they are in compliance. Other Advisory Council roles include assessing community needs; supporting the development of a service ethic in the community; advising on volunteer recruitment, retention, and recognition strategies; helping link the project with other community service resources, such as faith-based organizations; assessing project accomplishments and impact, helping to assess the satisfaction of volunteers and volunteer stations; suggesting ways in which the project can gain increased visibility and recognition in the community; advising on how community needs affect seniors they know; and helping to set short- and long-range targets for resource development and mobilization. Council members make themselves available to volunteers; in fact, the RSVP newsletter lists each member's phone number so that volunteers can

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contact them. The Advisory Council members also attend community events such as the Stockton Asparagus Festival, non-profit organizations, and athletic events which volunteers 55 years of age and older are likely to attend.

The RSVP Coordinator ensures that the project complies with all RSVP federal regulations. Current MOUs are kept on file for each volunteer station, and the RSVP Coordinator only assigns volunteers to work at stations with an active, signed MOU. MOUs are renegotiated every three years. The RSVP Coordinator procures a signed enrollment form for each volunteer annually; the form is used to determine eligibility as a RSVP volunteer. It includes date of birth, place of residence, insurance beneficiary, emergency contact information, and a signature signifying that the individual agrees to serve without compensation.

Organizational Capability

SJC RSVP falls under the umbrella of the SJC Human Services Agency's (HSA) Aging and Community Services Bureau (ACSB), which managed expenditures of \$8 million in fiscal year 2013-2014. HSA falls under the auspices of the County of San Joaquin, a political subdivision of the State of California. HSA and County policies and procedures govern careful stewardship of both internally and externally generated resources. Being part of a larger organization means being able to leverage economies of scale by sharing the expenses involved with accounting, clerical, human resources, payroll, and administrative functions, saving a substantial amount over what an isolated agency would have to pay.

SJC uses a multi-pronged approach in providing administrative oversight of the RSVP grant. The accounting staff is responsible for all grant-related payments, revenue deposits, and financial reports by contract/grant/subcategory. Separation of duties is built into both the County structure and also ACSB's staff responsibilities to reduce the possibility of fraud or misrepresentation. All accounting transactions generated by ACSB's Fiscal Unit must be further reviewed by the County's Auditor-Controller's Office and/or the Treasurer's Office. The County follows purchasing guidelines established to be in compliance with federal regulations, and purchases are managed by the County's Purchasing Department to ensure pricing and fairness in vendor selection. RSVP expenditures are monitored at least once monthly and compared to budget categories. If the Fiscal Unit identifies any significant variances in actual expenditures versus the budget, those variances are reported to the appropriate management staff, including the RSVP Coordinator. In-kind contributions are documented by donor name and valuation of each item. All matching funds are documented in accordance with OMB regulations.

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Currently staff assigned to the project include the SJC RSVP Coordinator, Community Services Program Supervisor, Community Services Program Manager, and the Deputy Director of ACSB. The SJC RSVP Coordinator, Olivia Briesmeister, has over ten years' experience as the RSVP Coordinator and works cooperatively with other ACSB staff, members of the Advisory Council, volunteer station staff, and officials of the CNCS to develop, plan, and implement RSVP in SJC. Her other duties include providing administrative oversight of RSVP by ensuring compliance with terms and conditions of the federal grant and applicable federal regulations. The RSVP Coordinator attends quarterly NorCal Director's meetings, serves as the NorCal Financial Secretary, serves on local non-profit boards and is a member of the LGBT Roundtable. The Coordinator reports directly to the Community Services Program Supervisor, Kristi Rhea. Ms. Rhea's responsibilities relating to SJC RSVP include the gathering, compiling and organizing of program information and statistical data; reviewing of applicable state and federal regulations, correspondence and manuals to determine need for developing or revising policies and procedures; and maintaining operational records, control records and other statistical data. Ms. Rhea evaluates program effectiveness; reviews cases and work for accuracy and compliance with regulations; investigates discrepancies; and recommends appropriate action. Ms. Rhea reports to the Community Services Program Manager. The Program Manager reports to the Deputy Director of ACSB, who reports to Joseph E. Chelli, Director of Human Services Agency.

HSA has written policies and procedures that cover internal controls to safeguard federal funds and assets purchased with those funds; cost allocation formulas for shared costs; allowed and unallowed uses of federal funds; federal procurement procedures; disbursement of federal award funds to minimize the time HSA holds cash payments received from the award; and documentation and valuation processes for volunteer time and donated goods and services. HSA oversees RSVP's internal postings, benefits, supervision, and evaluation tools. HSA's Human Resources division provides SJC RSVP with comprehensive staff development to support staff in effective performance management, use of computer software, and improvement of communication skills. HSA's highly skilled Information Technology (IT) Department ensures that SJC RSVP remains fully operational. The IT Network Operations Support team responds to daily user requests, maintains and upgrades network infrastructure and ensures that IT systems are secure from virus outbreaks and malicious attacks. Every RSVP staff person has a computer with email and Internet access, plus access to e-grants, printers, a copier, a scanner and a fax machine. SJC RSVP has an established procedure that facilitates tracking of volunteer station recruitment and management and ensures monitoring of work

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plans. Reports are generated quarterly to assess progress toward meeting recruitment and output goals. Additionally, RSVP maintains an operational manual that delineates internal policies on office processes such as e-newsletter production, external and internal communications, expense approvals and reimbursements, staff and vendor contacts, and volunteer insurance and travel information. SJC RSVP has developed record keeping and reporting systems in compliance with Corporation requirements that ensure quality of program and fiscal operations and facilitate timely and accurate submission of required reports. SJC RSVP maintains the grant files, including financial and programmatic records, supporting documents, and statistical records, and makes them available for review and inspection for at least 3 years from the date the final report is submitted.

Capital assets such as facilities, equipment, and supplies are managed from procurement to disposal through multiple County departments. All purchasing methods must follow pre-established guidelines to ensure fairness and competitive pricing. If an item exceeds \$1,000, it is automatically considered a fixed asset and is maintained and part of the annual inventory process. Items under \$1,000 but that have a significant useful life (e.g. printers) are also included in the annual inventory process. The Fiscal Unit maintains an inventory listing of all grant funded equipment purchases. At the point where inventoried items have reached the end of their useful life, the grant funded equipment list is checked to determine if a disposal process is required by the grant.

HSA will be the fiscal agent for this project and will provide general oversight through its Aging and Community Services Bureau (ACSB). HSA maintains a Financial Management System that can accurately record, report, and manage RSVP funds in accordance with grant terms and conditions. The system is able to account for costs charged to RSVP and has written policies and procedures, including procedures for determining allowability of costs. SJC RSVP provides all personnel who may be involved with approving or pre-auditing expenditures with a list of allowable and unallowable RSVP expenditures. The HSA Financial Management Division utilizes Microsoft Dynamics, General Ledger, and other related systems in accounting for RSVP grants. All transactions are recorded in the accounting system and source documents such as invoices, contracts, and receipts are retained. The accounting systems can generate a separate general ledger, revenue, expense, and balance sheet reports for each source of funding and produce combined reports for the entire organization. Revenues and direct costs associated with each federal award are segregated in a unique account within the financial accounting system. The system is able to generate budget to actual expense comparison reports and can produce proper documentation for all expenditures of federal funds.

ACSB has successfully managed federal, State, and privately funded grants of varying amounts for

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many years. Federal grants currently under management of ACSB total nearly \$7 million and include RSVP funds in the amount of \$48,938, Area Plan funds in the amount of \$2,234,365 (Title III Community-Based Services Program (CBSP), Ombudsman (III-B), and Family Caregiver Support (III-E), Senior Community Service Employment Program (SCSEP) funds in the amount of \$127,592 (Title V), and, Supplemental Nutrition Assistance Program Education (SNAP-Ed) funds in the amount of \$301,264.

In addition to above grants, ACSB partners with other County agencies to provide support and program enhancement for the AB109 Transitional Housing Program, Community Development Block Grant, CalWORKS, and other programs provided by HSA. SJC HSA provides a substantial cash match to the support of RSVP, significantly above the minimum required match. The RSVP Coordinator ensures continuing community financial and in-kind support to operate the project successfully. In 2012 RSVP was designated as one of the local organizations community residents can support through Stockton United Way's annual fund drive.

Other

N/A

PNS Amendment (if applicable)

N/A