

# Narratives

## Executive Summary

An estimated 1,120 RSVP volunteers will serve. Some of their activities will include meal delivery, emergency food distribution, respite care, and disaster response. The primary focus area of this project is Healthy Futures. At the end of the three year grant, 1,120 volunteers will have served, providing almost 150,000 home delivered meals, serving over 180 clients emergency food, providing respite to 96 caregivers, and providing over 26,466 hours of disaster recovery. The CNCS federal investment of \$101,151 will be supplemented by \$51,049 the first year of the grant (anticipated level of non-federal resources).

We project that at the beginning of the grant only 752 volunteers currently serving will fit in the new Community Priorities and Focus Areas. Charleston Area Senior Citizens Services, Inc. (CASC) will undertake a recruitment drive that will add 368 volunteers to help with the home delivered meal program. This state ranks seventh in the country for the rate of hunger among the elderly. All Meals on Wheels or home delivered meal programs here need additional volunteers to help meet the growing need for food. Volunteers will serve their communities well by addressing the need for meals to be delivered to the homes of frail elderly and disabled clients. These isolated clients will have increased social ties and reduced feelings of isolation after being assisted by RSVP volunteers.

CASC has been providing services to older adults since 1967 and currently provides the Foster Grandparent and Senior Companion Programs for this region. This agency welcomes the opportunity to expand our services to provide older adults, without income restrictions, the opportunity to better serve their communities.

## Strengthening Communities

Charleston, Berkeley, Colleton, and Dorchester Counties comprise a coastal region in South Carolina, with the City of Charleston forming the population hub of the four-county area. The four counties encompass a land mass of over 3,644 square miles. The U.S. Office of Management and Budget (OMB) has listed the Charleston-North Charleston MSA as 76th in population size (712,220) out of 381 Metropolitan Statistical Areas (MSA's) in the U.S.

However, the counties vary in population and density. Colleton County is the only county of the four not included in the MSA, and as the smallest has only 5% of the total population for the four counties.

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The total population for the county was just over 38,000 in 2012. The county is rural averaging just 36.8 persons per square mile and is ranked 43rd out of 44 counties for density in the state.

Just as in other states, the population in South Carolina has aged, but at a greater rate than average. In 2010, South Carolina ranked 32nd in the nation for the highest percentage of people age 65 and older. By 2030, the state is projected to rank 15th in the nation. (U.S. census, 2010) Local programs cannot meet the demand for services for older adults. The federally funded Title III Nutrition Program was created in 1972 as part of a system of coordinated, community-based services targeting older individuals of greatest economic or social need. The service funding has not kept pace with the growth in the senior population eligible for these services.

Primary Focus Area, Healthy Futures: South Carolina and this region in particular have a high degree of malnutrition and hunger among the senior population and people living with disabilities. That coupled with multiple barriers to care, waiting lists for services, and expensive and often out of reach private, for profit services; puts this population at great risk for relocation to a more restrictive environment. The Department of Health and Human Services has identified nutrition as a priority area in the health goals for the nation in Healthy People 2010. Poor nutrition is a major problem in older Americans and inadequate intake affects approximately 37% to 40% of community-dwelling individuals over 65 years of age. According to the SC Lt. Governor's Office on Aging there are currently over 8,000 seniors statewide on waiting lists for home care services such as meals on wheels. This state also ranks eighth in the rate of hunger among seniors (Meals on Wheels Association of America). Poor nutrition and/or hunger are linked to poor and declining health and hasten the need for in-home and ultimately residential care. In-home services forestall relocation of seniors from their homes into more restrictive environments such as assisted living facilities or nursing homes. (Briggs National Quality Improvement Hospitalization Reduction Study, 2010)

Vulnerable seniors become increasingly isolated as they lose social connections and suffer a lack of social, physical, and emotional support from others. Home Delivered Meal clients have multiple health problems and mobility limitations, putting them at great risk. (Ann M. Coulston, et al. Journal of the American Dietetic Association, 96(6): 570-573.)

Seniors needing meal service have an inability to adequately eat enough nourishing food each day.

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Homebound meal programs quiet the fear of hunger among a vulnerable population and add the key component of daily monitoring and social interaction with the delivery of the meal. Home delivered meals have become the hallmark of federally funded and religiously supported community programs that enable seniors to remain in their homes.

For a growing number of seniors meal delivery is the only social contact of the day. Historically, meal deliverers have been friends, impromptu personal care aides, family and monitors. The need for social, physical, and emotional support from others is critical to avoid institutionalization and premature hospitalization. Seniors who are isolated are likely to become depressed which in turn increases deeper isolation. This vicious cycle may be difficult to break by a frail, older adult without support. ("Successful Aging", Rowe & Kahn, 2007)

As the senior population grows, so does the movement to assist elderly people to "age in place". Yet as we age, increasing disability and loss of mobility often lead to a decline in social networks and support. Unfortunately, for homebound seniors, this connection to others is lessened as their isolation grows. In Chicago it was found that of all seniors living alone and below the poverty line, one out of three saw neither friends nor neighbors for as much as two weeks at a time and one out of five had no phone conversations with friends. (M. Hall & B. Havens; The Effect Of Social Isolation And Loneliness On The Health Of Older Women). Studies have shown that older persons who live alone and those who have health problems are more likely to be isolated (Durant & Christian). Furthermore, studies have shown that isolation and lack of connectedness to others are predictors of morbidity and mortality (Rowe & Kahn, 1997). Indeed, social relationships are linked to longevity ("Successful Aging" Robert Kahn, John Rowe, MacArthur Foundation Study)

For those at home who need assistance, eighty percent of the care provided in this country is by unpaid caregivers, many of them overburdened. (Underweight, Undernutrition, and the Aging, Today's Research on Aging, October, 2012). Overburdened caregivers have become a common problem with the average cost of respite care in this region reaching \$18.00-\$22.00 per hour. (Trident Area Agency on Aging) Many families, specifically caregivers, are unable to pay for respite care and non-profit agencies that might help have resources that are stretched to capacity and usually limit service to those who are low income. Overburdened caregivers are more likely themselves to develop health problems, compared to the general population.

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The National Family Caregiver Association reports that the stress of family caregiving for persons w/ dementia has been shown to impact a person's immune system for up to three years after their caregiving ends thus increasing their chances of developing a chronic illness themselves. Family caregivers who provide care 36 or more hours weekly are more likely than non-caregivers to experience symptoms of depression or anxiety. For spouses the rate is six times higher; for those caring for a parent the rate is twice as high.

Declining health results in more physician appointments, increased visits to emergency rooms and more treatments for chronic conditions. Older adults make up nearly one quarter of all emergency room visits. (AHRQ, Agency for Healthcare Research and Quality, 2013) Patients aged 45 years and older are visiting the doctor's office more often than persons in that age group did 10 years ago. In 2011, persons aged 45 years and older accounted for 53.1% of all physician visits. (National Ambulatory Medical Care Survey, conducted by the CDC.) The CDC reports that "seniors and older baby boomers are visiting the doctor more often to manage multiple chronic conditions, obtain newly available drugs, and seek preventive care."

However, access to health care in this region is limited. Berkeley, Colleton and Dorchester Counties have one hospital each. Colleton County, the most rural, has only one dialysis clinic and no mass transit. A one way trip to the VA hospital in neighboring Charleston County from Colleton County is 48 miles or more. A one way trip from northern Berkeley County to the VA or the Medical University Hospital is over 100 miles and at least a two hours trip. The Ralph Johnson Regional VA Medical Center and the Medical University of South Carolina, in downtown Charleston, serves all four counties; yet both are located at the extreme southern or southeastern edge of all four counties. Mass transit does not meet this need and is only available in a limited corridor from southern Berkeley and Dorchester Counties through the middle of the City of Charleston. Colleton County, eastern and western ends of Charleston County and the top half of both Berkeley and Dorchester Counties has no mass transit programs. For those with no vehicle or no access to transportation, getting to a physician's office or to medical clinics for routine treatment (such as dialysis) is an insurmountable barrier.

To address this community need of poor nutrition and incidence of hunger, need for respite care, and

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lack of transportation to health care among homebound older adults and disabled individuals, RSVP will place 719 volunteers in the Healthy Futures, Aging in Place Performance Measure H8. Providing transportation to health services, ensuring proper nutrition, and relieving overburdened caregivers will help to ensure that frail, and/or disabled homebound clients remain at home and institutionalization is delayed or prevented. Services will be provided to low income clients.

RSVP will place 636 volunteers at 9 stations that provide home delivered meals to poor, homebound clients. They will serve a minimum of 450 homebound seniors and disabled individuals, with clients receiving meals five days a week, totaling 49,800 meals. Volunteers will help to package, load vehicles and deliver food to homebound elderly and disabled clients in all four counties. Volunteers will deliver to the same clients, with volunteers serving varying times from daily to once a week. Volunteers must participate at least 8 hours per month for six months to have an effect upon the outcome measured.

All clients served by volunteers will participate in a pre and post survey using the Independent Living Performance Measure Survey. Over 1,750 visits to deliver meals by volunteers will be made to homebound seniors during the first six months of the contract year. These visits by regular teams of volunteers delivering meals will be every day, although short in duration (approximately 10 minutes). Over the course of six months the homebound clients will develop a rapport with the volunteers that serve them and will report feeling less lonely and have feelings of increased social support. Ultimately, the clients will report that the nutritional support and social contact have enabled them to remain at home with improved quality of life.

The pre and post surveys will be conducted by telephone by the station volunteers under the supervision of station staff. All volunteers selected to do the telephone surveys will receive training on how to conduct phone surveys and how to tabulate the results. All results will be collected by the RSVP Coordinators and utilized in 6 month progress reports.

RSVP will place 18 volunteers will be placed in 2 stations to provide transportation services. Volunteers will transport clients on regular trips to hospitals and clinics; with volunteers participating at least twice a month for six months to be involved in computing the results from the survey that is used. Each round trip will be at least two hours in duration, with volunteers involved at least 8 hours per month. The volunteers will receive training in utilizing the Independent Living Performance

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Measure Survey and will administer this survey at the beginning of the service (pre-test) and again at six month intervals. Volunteers will forward the completed surveys to RSVP staff by prepaid mail.

RSVP will place 23 volunteers at homes, through assignment at 3 stations to provide respite service for overburdened caregivers. Sixteen caregivers of homebound clients will receive at least 2 hours per week of respite service for six months. Volunteers must provide at least 8 hours per month to be counted toward the performance measure H14. The pre and post surveys (Senior Corp Respite Performance Measure Survey) given to the caregivers to determine the effectiveness of the respite service will be conducted by telephone by the station volunteers under the supervision of station staff. All volunteers selected to do the telephone surveys will receive training on how to conduct phone surveys and how to tabulate the results. All results will be collected by the RSVP Coordinators and utilized in 6 month progress reports. The surveys will show that those who received respite service for at least 8 hours per month reported feelings of increased social ties and perceived social support.

Performance measure H10 will be addressed by placement of 42 volunteers at 4 agencies that are food banks or free lunch programs, available to not only seniors, but to families and children. The number of individuals (including children) receiving assistance from volunteers will be counted. Each station will provide each month the number of unduplicated clients served by volunteers, drawing figures from the USDA monthly reporting form. The count will be done by agency staff and emailed to RSVP each month, with a six months total of unduplicated clients served. RSVP staff will utilize these figures in the 6 month progress report.

Because the area has a high population of retired seniors, a portion of the clients served in the Healthy Futures focus area will also be retired veterans and their families. A separate count of the number of homebound veterans will be maintained by adding one question to the Independent Living Performance Measure Survey and the Senior Corp Respite Performance Measure Survey that determines military service. The USDA reporting form also will determine military status. Reporting stations providing food bank or free lunch programs will be asked to include that information in the six month unduplicated count report.

To meet the Performance Measure V8, requiring volunteer efforts that promote community based efforts to meet the unique needs of military families while a family member is deployed and upon that

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family member's return, RSVP will place volunteers with three stations that conduct fund raising efforts to help families in need. 37 volunteers will help to plan, coordinate and conduct fund raising efforts sponsored by one station throughout the year. Proceeds from the fund raisers are used for selected families to help with utilities, rent, appliances, etc. Three volunteers will help to promote efforts within the community to serve the needs of veterans and active duty military by working in a consignment shop dedicated to serving military. The stations will be required to report quarterly upon the number of unduplicated persons who have been helped by utilizing a sign in sheet for clients served and a spread sheet on services provided. The station staff will report the data to RSVP staff on a quarterly basis. The goal of these activities will be to lessen the financial burden upon veterans and their families, thus improving the quality of life for those served.

Three volunteers will be placed at the VA hospital pharmacy department to assist veterans and families of veterans who need help in obtaining medications. The volunteers, working under Performance Measure V1 will assist veterans in accessing services and helping promote efforts to meet the needs of veterans. The pharmacy department will track on the unduplicated count of veterans, who have been served in one year, reporting will be quarterly to RSVP staff. This department requires clients to sign in and produce ID. Nine volunteers at the VA hospital will be assigned to serve as van drivers, friendly visitors to patients, escort and assist visitors, and draw blood.

Under the Other Community Priorities, 75 volunteers will be assigned to work at the Patriots Point Maritime and Naval Museum. The museum is home to two ships (an aircraft carrier and a destroyer, and the Medal of Honor museum. The mission of the foundation is to cultivate a unique learning environment that connects generations by celebrating America's history and heroes, inspiring freedom, patriotism, leadership and service. Patriots Point is the first aircraft carrier museum with over 400,000 visitors annually. The Education Program offers educational programs- astronomy, aviation, history, journalism and oceanography- for students of all ages. Each program is designed to capitalize on the unique aspects of the naval and maritime museum as well as the surrounding estuary where the Yorktown is berthed. The goal of this museum is to preserve historical accuracy and to teach patriotism and respect for the men and women who have served this country.

Under Other Community Priorities, 11 volunteers will spend 88 hours each month providing companion services to military veterans housing in the VA Victory Nursing Home. These volunteers

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assist the veterans by assisting them at meals, accompanying and assisting them in facility sponsored activities and events, leading programs, and planning and conducting veteran celebrations.

### Recruitment and Development

Charleston Area Senior Citizens Services, Inc. Board of Directors recognized that the strategic plan for the organization must make a statement about the role of the agency within the community. Adopted originally in 2002 and updated annually, the plan's central vision statement includes:

1. "CASC must ensure that services must be available to a broad range of seniors in crisis or in need of information, assistance, or opportunities, regardless of race or income."
2. "CASC must serve as a major point of entry for aging services within the community."
3. "CASC must serve as an advocate for seniors in the community. The agency must foster initiatives that build alliances among service providers, rally community leaders concerned about aging issues, and construct a coalition of city, community based, and social organizations interested in promoting the needs of the older adults in the community. CASC must also enable older adults to remain actively engaged in the community, foster social connectiveness for all seniors, and promote the value of senior participation within the community."

Our community and agency is poised to implement the changes in RSVP focus and funding. We find them exciting and very much aligned with our agency and community's social service direction on outcomes in targeted areas of impact. We know successful and meaningful volunteer engagement will encourage or foster future or further recruitment or engagement, so a key part of our recruitment plan is ensuring effective engagement at every station. It is clear this program is a good fit for our vision of providing opportunities for seniors and helping them stay actively involved in their communities. We see the program as a win for everyone.

1. We require and support utilization of best practices in volunteer engagement at all of our stations.
2. We will select and monitor stations based on these best practices.
3. We will encourage participation in LASCVA (Lowcountry Association of Volunteer Administrators) as the local professional organization focused on effective volunteer engagement.

Critical to our recruitment plan is the ability to attract new volunteers representing the diverse community, with the skills needed to perform outcome based duties. CASC will develop messaging strategies and materials that highlight the benefits of being a part of RSVP. The first task will be the

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development of messaging and materials to be used by agency staff, Community Advisory Council members, station staff, and current volunteers to raise awareness about RSVP.

CASC will utilize local marketing experts (at no cost) to assist CASC in the development of such materials. It will be necessary to integrate RSVP into the general organization materials, merge RSVP into the agency messaging, and add RSVP to the existing web site, while creating a new dedicated site for RSVP. A review of other programs around the country will be conducted during this process to gather and review successful recruitment methodologies.

CASC staff will also meet with and/or survey current volunteers -- what they perceive as benefits, what they would be willing or able to do to recruit, and what changes would they suggest for easier or increased engagement. Stations will also be surveyed using Survey Monkey (a free online survey tool). And we will ensure that our process for engagement makes it easier for partners to sign current volunteers up for RSVP participation.

Using the Recruitment Plan will involve general outreach efforts such as utilization of the media, speaking at local events and service organizations, maintaining a presence at community events, and working with faith based organizations. Targeted outreach efforts may include staff presence at senior community events (such as Senior Day at the Fair) and displays at businesses that feature a senior day (such as local grocery stores). Staff will also reach out to senior retirement communities and retired business associations; partner with corporate and government entities and their employee retirement plans, and AARP tax sites.

Trident United Way 211 Hotline has also agreed to sign an MoU that not only details their role as a new station but also as a recruitment agency for RSVP volunteers. The 2-1-1 (Give and Get Help Program) will provide an online and telephone based means for potential volunteers to link with RSVP. CASC staff and 2-1-1 staff will jointly review the protocols used to assist callers or site visitors to ensure that appropriate referrals are made from 2-1-1.

Our local Trident United Way is actively engaged in measuring many of the outcomes designated in this new RSVP funding strategy as part of our community's 2020 goals. In partnership; CASC and TUW will share goals, data, measurement tools, and the learning environment of Collective Impact. Trident United Way's 2-1-1 works to engage community members in activities that improve

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education, financial stability and health. As partners, CASC will leverage seniors in our community in these collaborative efforts. With TUW, we will coordinate development of a database of affiliated stations or host sites, assurance of best practices in volunteer engagement and measurement of the work done.

The Recruitment Plan that is developed will contain a time line for implementation. The plan will also detail the strategies involving five key elements for recruitment: the media, general outreach and marketing, targeted outreach and marketing, structured word of mouth that engages current participants and partners, and involvement of stations and community partners. Following consensus on the approach, the CASC Director of Development will develop materials to have in stock such as posters/fliers, referral wallet cards for current participants to carry and distribute to prospective volunteers, brochure or rack cards, PowerPoint deck for speaking engagements, and web links for other agencies to use.

The Recruitment Plan will be a Call to Action. This will be an invitation for existing volunteers to help to attract new members and for specific stations to ask for help in addressing identified community needs. Rewards and prizes will be provided to current volunteers who refer the greatest number of new applicants. Promoting the benefits of volunteering will be integral: highlighting the social connection and networking opportunities, the research that demonstrates that volunteering has health and longevity benefits, and that this program makes it easy for people to give back -- baby boomers can and do make a difference.

It will be important to engage the media -- traditional and social media - in the strategies for recruitment. The CASC Director of Development will meet with the media to educate them about the program, develop PSA's and press releases that highlight statistics about the healthy benefits of retiring, submit letters to the editor periodically -- from volunteers who are actively engaged in recruitment, and submit an "op-ed" letter when appropriate. The CASC Development Director will submit articles to local magazines and senior publications about the program. RSVP staff will appear on local television shows to promote the program. CASC will also utilize social media as a means to publicize the program, and recruit and retain volunteers. A separate website for RSVP will be developed, linked to the CASC site (which will also contain information about RSVP). A Google ad to ensure top placement for the RSVP site will be paid for by a local donor. CASC staff will also create a

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RSVP Facebook and twitter account that will have regular and timely postings as well as create banner ads for partnering websites.

As RSVP grows in the community we will incorporate volunteer "profiles" highlighting role models and inspiring stories. We will also promote program data that shows the results of volunteering and the differences that were made. The recruitment plan will also contain an evaluation plan to be implemented at the end of year one. Successful strategies will be continued and new ideas, approaches, and methods will be added.

CASC will maintain current stations that match the identified priority areas and develop opportunities for meaningful and positive volunteering at new sites as well. To engage the community and to help with on-going site selection, identification of community needs, and the development of meaningful volunteer roles; CASC will utilize the CASC Board of Directors, RSVP and CASC staff, and the RSVP Community Advisory Council including representatives from TUW. Regular meetings and joint discussions will ensure that volunteer assignments are designed to address community needs and that participating stations are the best to help meet these needs. Input will also come through linkages with other community agencies, community groups in which CASC participates such as the Rotary, Garden and Exchange Clubs, volunteers, and/or community leaders. Currently, CASC has linked with area churches to provide volunteers and to refer clients to the agency for services. Announcements about RSVP and the opportunities to volunteer will be placed in church bulletins. Flyers will be distributed to area day cares to reach many of the grandparents who help to raise their grandchildren and for adult children who are helping their own parents find volunteer placement. CASC has an extensive list of community partners who offer financial and volunteer support, engage in dialogs with CASC staff, make referrals for CASC services, provide services to CASC client referrals, and supply professional development for CASC staff. Staff, volunteers and clients routinely participate in local /state events as part of the agency strategy for coalition building. These resources and relationships will enable CASC to continually identify and / or redirect volunteer opportunities that are meaningful and in concert with selected focus areas. CASC currently has active Memoranda of Understanding with 46 organizations in the Lowcountry for the Foster Grandparent Program and Senior Companion Program and will add more with the RSVP grant.

Equally important as recruitment and partnerships with host site agencies will be retention and

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recognition of RSVP volunteers. To ensure correct matches between volunteers and host sites, the RSVP Director or one of the Coordinators will meet and interview each new volunteer applicant; use an application tool that identifies education, interests and skill sets; review the RSVP volunteer job descriptions for the community; and then assist the volunteer in choosing at least one station at which to volunteer. The station will be contacted by phone and the volunteer introduced by conference call to the host site; with the date and time of orientation and start date decided at that time. A follow-up email or phone call will be made to the new volunteer to ensure that the connection was a positive one and that other volunteer opportunities should not be explored. The appropriateness of the volunteer's duties at the host site and adherence to federal regulations will be monitored by RSVP staff on an ongoing basis. Hours of service will be tracked through Volunteer Reporter, the software which CASC utilizes for the Foster Grandparents and Senior Companion Programs.

The connection of each volunteer to RSVP will be enhanced by ongoing communication and opportunities to participate in life skills education, training in specific focus areas, and CASC sponsored events. CASC maintains a website, distributes monthly Eblast newsletters, and utilizes social media sites to publicize services, opportunities and events. These efforts will be expanded to include this new program. RSVP volunteers will receive a separate Eblast (or hard copy) relevant to RSVP volunteers and seniors. The agency already supports monthly events including an annual celebration of National Volunteer Week. These efforts will be expanded to include RSVP volunteers.

Life skills educational programs tailored to meet the needs of specific volunteers within RSVP will be coordinated with input from the host site staff. Free programs will include sessions such as "Assisting Alzheimer's Clients", "Dementia Dialogues", "Signs of Child Abuse" and the "Veterans Administration National Caregiver Training Program". Monthly programs offered to RSVP volunteers will be led, coordinated, or co-sponsored by RSVP staff and community partners and will be free for volunteers. All volunteers involved in working to meet community needs will be included and training for volunteers in each work plan will be developed with the purpose of increasing the volunteers' skills and reinforcing the concept that each volunteer is a member of a national program dedicated to making a difference.

Annual recognition events will be held by county and will include a proclamation from each county council thanking the volunteers for their efforts. Promoting and growing RSVP in the four county

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area is a natural fit for an agency, such as CASC, that champions the value of older adults in the community, the importance of maintaining a connection to that community, and enabling older adults to share their skills and experience with the community. Building camaraderie among volunteers through fun and educational events held throughout the year will assist in volunteer retention.

### AREA DEMOGRAPHICS

Berkeley, Charleston, Colleton, and Dorchester Counties comprise the "Lowcountry" of South Carolina, a region steeped in history and tradition. First settled in the 1700's, the counties experienced slow growth with limited industry and were primarily an agrarian society. But this area has undergone a rapid and fundamental change. The 2010 U.S. Census showed that this region has one of the fastest population growth rates in the nation at 12%, and notably, South Carolina ranks fifth in the nation for the percentage of relocating seniors. An estimated 750,000 people live in the four counties (U.S. Quickfacts, 2013). Statewide the senior population growth is consistent with national trends, with additional numbers of seniors represented by net in-migration as retirees seek the "sun belt" climate and activities.

The demographic and racial make up in these counties varies. Approximately 30% of the region as a whole is African American and the region is older than the national average with the median age over 35. Berkeley and Dorchester Counties, within the region, are two of the fastest growing counties in the country. In 2013 the U.S. Census estimated that 145,397 people resided in Dorchester County, an increase of 29% from the last decade. Berkeley County had an estimated population of 194,020 residents in 2013, with a growth rate of almost 25% from 2000 to 2010. Both lie north of Charleston and the lower portions of each county are included in the Charleston -- North Charleston MSA (Metropolitan Statistical Area). The northern portions of both counties however, are very rural and poor. Colleton County lies west of Charleston County and has a population around 38,000. The county is rural, the fifth most rural in the state.

Of Charleston County's total population of 365,162, eighty-six percent lived in an urban area. With a population density of 258 people per square mile, the county is the fifth most dense in the state. Charleston County also has almost half of the population of the entire four counties. There is a major military presence in this region and the military is still the largest single employer.

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This area has a service based economy and tourism is significant factor in the four county economy. The tourism industry contributed \$16.7 billion to the direct and indirect revenues to SC Gross State Product. It employs over 200,000 people, approximately 10% of the state workforce. (SC Council on Competitiveness) Over four million tourists visited the City of Charleston last year. (Charleston Visitors Bureau)

The City of Charleston the county seat of Charleston County is a diverse and vibrant city. Charleston is a port city, a destination city for world travelers, and has multiple colleges, a military college and a teaching medical university. The average median value of an owner occupied home in 2012 was \$255,600. More than ninety percent of city residents graduated high school and almost half have a bachelor's degree or higher. Yet almost 20% of the residents lived below poverty. Forbes Magazine lists Charleston as one of the best retirement locations and many military retirees heed that advice because of the cultural and recreational opportunities and mild weather.

With such diversity in the region CASC will look at and utilize all of these demographics to engage a diverse and representative population into service. A large component of that population will be the new retirees and those 55 and older who have relocated here by choice or due to jobs or family. RSVP provides a wonderful opportunity for "newcomers" to get involved in the community, to make friends and to become stakeholders in the area.

CASC currently operates the Foster Grandparent and Senior Companion Programs and approximately 85% of the volunteers are African American. The 300+ individuals that volunteered last year for CASC in other programs represented all age groups, income levels, and educational levels. CASC recruits volunteers from wealthy retirement communities, seniors form subsidized housing complexes, disabled veterans, and military families. RSVP will allow CASC to expand the agency's volunteer recruitment, as detailed above, and draw from the rich diversity of this region. We will do all of this with the goal of transforming or strengthening our community. We know service (or volunteer engagement) benefits everyone; the individual volunteer, the program and the community.

### Program Management

CASC will seek to ensure that all volunteers and volunteer stations meet guidelines set forth by the Corporation. Potential volunteer stations will be selected based upon the identified community need as

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described in the work plan and that agency's ability to address that need. Project staff will conduct a thorough assessment of the site, before negotiating the Memorandum of Understanding. Volunteer stations will be required to provide adequate supervision of volunteers and provide required operational and programmatic documents. Stations will be visited annually by staff to ensure compliance of federal regulations and that assignments are compatible to both the volunteer and the performance measures.

Staff will utilize Survey Monkey, a free online survey program, to conduct surveys of stations about prohibited activities, value and need of reporting volunteers and service data, and satisfaction with volunteers. RSVP staff will conduct telephone audits once a year; contacting the host site supervisor to review volunteer participation, reporting, duties, and attendance.

All issues related to growth and program operation will be planned by CASC staff and the RSVP Community Advisory Council. The Community Advisory Council will oversee needs assessments and conduct an annual self-evaluation of the project. Written reports of expenditures, activities, developments and fund raising events by the Advisory Council are provided by the RSVP Project Director to the Executive Director.

Project files are maintained for both volunteers and volunteer stations by the RSVP Director. The Project Director has utilized Volunteer Reporter for data management and will continue to do so at CASC. Data from the previous sponsoring agency will be transferred to CASC to maintain program integrity, history, and volunteer performance. Documentation of activities, monitoring reports, evaluations, and all other records will be maintained by the RSVP Director. The project budget will be carefully monitored by the RSVP Director, Executive Director, and Finance Department on a monthly basis, and CASC Board of Directors will monitor quarterly. The budget will be reviewed by the RSVP Community Advisory Board on a quarterly basis. Work plan measurements will be reviewed by the RSVP Director and each Volunteer Site Supervisor every 6 months. All financial documents and or transactions are maintained by the Project Director and CASC's fiscal department. These transactions are reviewed daily/weekly by the sponsor's fiscal department and Project Director. Financial statements will be provided to the RSVP Community Advisory Board for quarterly review. The planning of expenditure activities, developments and fund raising events by the RSVP Community Advisory Board are provided to the Executive Director in advance for approval. CASC reports to CNCS

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semi-annually as required. Fund raising activities for the agency and for each agency sponsored service are carried out by the Executive Director, Board of Directors, the Development Officer, and Advisory Council members. The sponsoring agency will provide resources for the program in addition to those that are required within the grant. Any time spent on fund raising efforts by Project staff would be charged to CASC, not CNCS.

Given the rich pool of professionals in the area (medical school, teaching hospital, three community hospitals, community college, public and private colleges within the community), staff will plan enrichment / recognition activities to enhance skills within the volunteer pool. Volunteers will have the opportunity to enhance skill levels by attending programs offered by local authorities in such topics as Alzheimer's treatment, depression in older adults, and identifying dementia. An annual calendar of events is planned by the Executive Director and presented to the Board of Directors. This plan identifies the proposed amount to be raised and how the funds are to be dispersed. An annual contribution by each member of the CASC Board of Directors is also expected. A weekly staff managers' meeting is also utilized to share identified resources and services for clients, such as free training, community events, and community give-aways. The Advisory Council members are asked to develop an annual fund raising calendar that details the type of fund raiser to be held for approval by the Board of Directors.

American Red Cross, the current sponsor for RSVP in these four counties, has voluntarily decided not to compete for the RSVP grant; but has pledged to work with the new sponsoring agency to ensure a smooth transition. If CASC is awarded the RSVP contract, the current American Red Cross RSVP Program Director and two Coordinators will join the CASC staff. Red Cross staff has already begun the process of notifying agencies and volunteers about the new standards for RSVP. By newsletter and phone calls they have begun to explain the transition from one sponsoring agency to another, the necessity for some volunteer efforts to be transferred to the host site or station, and the necessity for some agencies to end their affiliation with RSVP. All volunteers not involved in activities that meet the performance measures in the new grant will be encouraged to accept new activities that do so.

Active volunteers that are involved in activities that comply with approved performance measures will be encouraged to continue to serve their community during the transition from one sponsoring agency to another. This encouragement will come from the American Red Cross by way of their

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newsletters and by letter from CASC (if awarded). CASC will honor the work of current stations and help them all align with the changes set out in new funding protocols. We will work to build bridges that support this change. Any volunteers that remain with agencies that are not in the workplans will receive a commendation from RSVP for time served and thanked by letter sent from the CASC Board of Directors. The Executive Director and the RSVP Director will meet with all sites that must be graduated, thank the staff for their efforts, and present letters from the CASC Board of Directors and the Community Advisory Council commending the agencies for their service to the community. CASC will partner with the current RSVP Sponsoring agency, American Red Cross, to ensure a smooth transition for staff and volunteers. (Current RSVP staff members will join CASC staff on April 1, 2015 with approval of this grant application.) As soon as the new RSVP grant award is announced all host sites will receive a joint letter from the American Red Cross and CASC explaining the program transition and the contact information of the new sponsoring agency. CASC will also notify all current host sites by mail and by telephone of the program transfer if this application is approved. All current volunteers will receive a letter from both agencies explaining the transfer and asking each to continue their volunteer efforts. Since American Red Cross staff and CASC staff have collaborated in the past and attended Senior Corp training events together for many years, we do not anticipate any difficulty in the sharing of data and records.

CASC has chosen as the primary focus area Healthy Futures. This agency has been providing services to seniors for almost forty years with the ultimate goal of enabling seniors to age in place and to remain safely in their homes. The agency maintains relationships with over 40 community agencies, with many of them serving seniors. CASC currently provides food, transportation, in-home care and respite care service to almost 2,000 clients a year. The food services that this agency provides; group dining, emergency food, and home delivered meals are outcome based programs. The respite care program is also outcome based and CASC has been developing methodology to collect data to measure outcomes for more than 15 years.

CASC currently has Advisory Councils for FGP and SCP, and the RSVP Director will staff the RSVP Advisory Council. Members of the existing RSVP Advisory Council will be invited to serve on the CASC Advisory Council for RSVP beginning April 1, 2015. The Advisory Council by-laws, membership structure will be approved by the CASC Board of Directors prior to the beginning of the contract. The Advisory Council will meet quarterly, with sub-committees meeting more frequently.

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CASC has a quality assurance program, developed in 2002, and approved by the Board of Directors as part of the strategic plan. Created to ensure that clients routinely have a voice in determining the quality and types of services being offered; the internal quality assurance program is in place to provide periodic reporting of the agency's performance and to identify the met or unmet needs of its clients. Rotating groups of clients are selected for telephone survey and questioned about the type of service provided by CASC, the quality of the service and the attitude and professionalism of staff and volunteers representing CASC. Clients and care givers have an opportunity to identify any problems or unmet needs that the agency can address. These surveys are an invaluable mechanism for gathering the "on the ground" voice of the community as to the needs of seniors and how CASC can enhance their lives -- enhancing the lives of older adults is our mission.

### **Organizational Capability**

Charleston Area Senior Citizens Services, Inc. (CASC) was chartered in the State of South Carolina as a 501(c)3 organization in 1967 to originally serve senior citizens in three counties but now serves Berkeley, Charleston, Colleton, and Dorchester Counties. The agency operates under the direction of the CASC Board of Directors with members who represent the geographic service area and the diverse population that is served. The purpose of the organization is to promote the social, mental and economic well-being of the seniors in the region. CASC administrative offices are located within a multipurpose senior center in downtown Charleston and the agency offers an array of services for older adults and care givers. CASC has sponsored The Senior Companion Program since 2002 and The Foster Grandparents Program since the mid 1970's. CASC built and has managed a subsidized housing complex (federally funded, section 8, 202) since 1983 that provides housing for seniors. CASC has continuously held federally funded Title III contracts for meals, transportation, and group dining since the mid 1970's.

CASC has a staff of forty-two full and part time employees. Key staff for the agency includes the full time positions of Executive Director, Finance Director, Development Director, Program Directors for the Foster Grandparent Program and Senior Companion Programs, Case Manager, Meals Operations Manager, Property Manager and Service Coordinator. Part time staff includes the Deputy Director, meal deliverers, Outreach Techs, Program Coordinators, administrative staff, janitorial and group dining staff. The Executive Director, who has held this position since 1998, has worked in aging services for over forty years; previously, as an Area Agency on Aging Director and as a Manager for a

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comprehensive health care organization. The Deputy Director has worked extensively in non-profit settings, and prior to CASC was the CFO at a large multi-county Community Action Agency. The Finance Director worked in the private sector providing accounting services for over twenty years prior to joining CASC in 2002. The FGP Director is a licensed insurance agent, certified property manager and a former admissions director of a local residential care facility before joining the staff a year ago. The SCP Director is a six year veteran of the US Navy and was active in senior programs in this area for 11 years, before joining the SCP Program in 2006. The RSVP Director has held this position since November, 2013 and will join the CASC staff as the program transitions to the new host agency. She has had over 26 years of volunteer management experience in non-profit and governmental settings. She completed the Non-Profit Management Certificate Program at Duke University, Women in Management at UNCA and Leadership Asheville 16. She has participated in board leadership roles for local and statewide volunteer management organizations, is a certified volunteer administrator through NCAVA and has presented at local, state, and national volunteer training events. The current Colleton County Coordinator and the Charleston/Dorchester County Coordinator will continue in their positions following the program transfer to CASC. Both have received training in RSVP policy and procedures, volunteer intake and registration, and Volunteer Reporter software.

The RSVP program will be supported by administrative and fiscal accounting staff that has experience with the operation of federal grants. The CASC financial management system consists of an annual audit by a local CPA firm which includes an A-133 audit. Sound fiscal policies have resulted in audits with no findings for a number of years, and the auditing firm now recommends this agency to other non-profits for technical assistance and accounting services. CASC uses an accounting software management program to ensure departmental accuracy, yet consolidation for the agency. The Executive Director and the Finance Director conduct in-house file audits for each agency program throughout the fiscal year.

A networking system which includes a Microsoft server connected to 19 stations, 5 available independent laptops for use in the field or for emergency situations, an A Star-Plus intercom-Telephone Communication System, a presentational screen and projector for presentations & training and high-speed DSL are available for agency staff. The fiscal department is managed by the Finance Director, who reports to the Deputy Director and Executive Director. All procedures and internal

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controls follow the Fiscal Manual approved by the Board of Directors. The agency has in place a purchasing procedure which consists of approved requisition and signed purchase orders, internal controls for tracking accounts receivable and accounts payable, and a two signature system of check writing. Purchasing, ordering, and inventory duties are completed by fiscal staff. Local travel is reimbursed bi-weekly. Long distance travel must have prior approval by the Executive Director. CASC utilizes a three copy receipt book to log in all in-kind donations. Front desk staff and Program Directors are trained in the proper procedures of inkind documentation, copying the Finance Department and Development Director, record keeping, and filing. The Front Desk staff tally donations monthly and send the figures to the Finance Department for comparison. Cash and checks received by mail are logged by the Front Desk staff and turned into the Finance Director with copies to the Executive Director and Development Director.

CASC issues a policy and procedure handbook to all employees upon hiring. The Executive Director also performs personnel duties and coordinates all staff training that is contractually required. She also is in charge of risk management and works with the agency's Certified Risk Manager to minimize, monitor and control the impact of unfortunate events or to maximize the realization of opportunities. All employees are required to sign in and out each day recording their time on duty and to submit a time sheet every two weeks, signed by their supervisor. Separate time sheets are used for exempt and non-exempt staff.

The Quality Assurance Standard of CASC requires that a rotating sampling of all clients served in each program be contacted by phone each month. Each client is interviewed by CASC staff (not affiliated with the service) to determine client satisfaction, quality of service delivery and unresolved complaints. Problems or dissatisfactions are recorded and distributed to appropriate staff for resolution. Actions taken are recorded on the intake form and submitted to the Executive Director who in turns submits a Quality Assurance Report to the Board of Directors.

CASC provides 9 major programs and services through federal, state, municipal and local funding: 1. Housing: Section 8, 202 HUD subsidized housing complex with 77 apartments for low income seniors adjacent to the senior center. 2. Case Management: Weekly monitoring, assessment, and emergency services. 3. Meals on Wheels: CASC delivers an average of 450 meals daily within Charleston County. 4. Group Dining: Twelve thousand meals are served annually at the senior center. Health and

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wellness programs and recreational activities are provided daily. 5. Financial Case Management: Staff provides financial and budget counseling and assists with entitlement and benefits applications. 6. In-Home Care: Frail, at-risk seniors receive in home and some personal services. 7. Senior Companion Program: Funded by the Corporation for National and Community Service with 67 volunteers providing 48,960 hours of service. 8. FGP: Funded by the Corporation for National and Community Service, 81 volunteers provided 56,264 hours of service. 9. Commodity Food Boxes and Emergency Food Pantries: CASC maintains 2 food pantries serving 250 seniors annually and distributes 300 boxes of food monthly. Volunteers who do not receive stipends are used extensively throughout CASC services. Volunteers are met at the front desk, asked to sign in and out and compute hours served, and placed by the Development Director with a Program Manager for duty assignment and supervision. Last year, CASC utilized over 300 such volunteers, with more than half aged 55 and older.

RSVP will become the tenth major service that CASC provides. Daily management of RSVP (such as recruitment, placement, maintenance of fiscal and program records and reports, recognition and educational activities, coordination with host sites, and program evaluation) will be overseen by the RSVP Director, who will report directly to the Executive Director. Two part-time Coordinators will assist the RSVP Director. All Program Directors receive monthly financial statements that show their budgets year to date and remaining balance. RSVP will follow current procedures for FGP and SCP in that RSVP staff will utilize Volunteer Reporter software to track volunteer data and units. The Program Director and volunteers will enter and maintain the data. Both the Executive Director and the Finance Director will have access to the software. Every two weeks all program staff prepare volunteer mileage reports and departmental staff payroll sheets that are sent to the Finance Department. With supporting documentation attached, checks cut are reviewed and signed by the Executive Director and a Board member for payroll, stipend, mileage and invoices.

The RSVP Director will have a separate office housed within the CASC senior center. She will have access to the 13,527 square foot senior center space that includes a training room, conference room, large meeting space, commercial kitchen and large dining room. Weekly Managers meetings are held by the Executive Director to discuss events, problems, schedules, concerns, documentation/reporting procedures, and client concerns. Each Department Manager submits a weekly report to the Executive Director, with a copy to the Finance Director. Two part time Program Coordinators will be supervised by the RSVP Director. Both Coordinators will serve as liaison with adjoining county host sites and

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volunteers, recruit and enroll new volunteers, and assist in planning educational and recognition activities for volunteers. Both Coordinators will continue to work 10 hours per week.

### Other

n/a

### PNS Amendment (if applicable)

n/a