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Executive Summary

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In the Monroe County (NY) RSVP program, an estimated 750 volunteers will serve. They will provide transportation to facilitate access to regular healthcare for older adults; provide respite and in-home care to support the ability of homebound older adults and persons with disabilities to live independently in their own homes; provide access to food resources through home delivered meals to homebound elders and persons with disabilities and prevent falls among older adults and self-empowerment around management of chronic diseases by delivering evidence-based instructional classes.

RSVP volunteers will serve the community in over sixty stations, with more to be established over the three year grant period. The primary focus of this project is Healthy Futures. At the end of the three year grant, improved access to medical care and essential services for older adults without vehicles (350 volunteers will provide 10,000 one way trips and 90% of the recipients will not need to cancel and appointment during the grant period due to a lack of transportation); extending independent living for older adults and offering support to their caregivers, reduction of fall risk and incidence of falls; improved adult literacy; greater economic security for low income individuals; greater engagement in academic activities and improved educational achievement among disadvantaged youth.

The sponsor agency, Lifespan is a not-for-profit social organization that provides information, guidance and services that help older adults and their caregivers take on both the challenges and opportunities of longer life. Lifespan has been a committed sponsor of RSVP services in Monroe county for over 40 years, and their commitment continues to be strong as evidenced by their strategic plan, approved by the board of directors in January 2014.

The CNCS investment of \$81, 937 will be supplemented by \$24,581 non-federal resources.

Strengthening Communities

Strengthening Communities

Describe Community and demonstrate that the community needs identified in Primary Focus Area exist in geographic service area

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Monroe County, New York, located in the western part of the state, had a population of 747,813 in the 2012 US census. Of this number, 109,928 are over 65. The number of older adults in the county has been steadily increasing for the past 40 years. Since 1970 the number of older adults has increased by 50% in the county; since 2000 alone, the number of 65 year olds has increased by 14,129. Of the 747,813 residents in the county, 14.7% are 65 or older

(<http://quickfacts.census.gov/qfd/states/36/36055.html>). This percentage is expected to rise to 20.3% by 2030, as the population continues to age (Cornell University Program on Applied Demographics 11/2008). This indicates both a strong, growing source of potential volunteers, as well as a growing number of older adults who potentially will lack resources and utilize the services offered by community nonprofit agencies in order to help them remain independent and healthy.

The metropolitan center of Monroe County is the city of Rochester, with a current population of 210,532. In addition to the urban core, Monroe County also has several towns, villages, hamlets, and rural areas. The growing "boomer" population in the area indicates that there is a large pool of potential RSVP volunteers to draw from. ¿Buoyed by a cadre of older adults who are willing to give back, Rochester-area residents volunteer at a higher rate than almost any other city in the nation.¿(Democrat & Chronicle- December 26, 2013). Over the past three years, 35.1 percent of local residents have volunteered annually in some fashion, according to a report by the Corporation for National and Community Services which survey 51 large cities.

Other factors in the community point to a wealth of volunteer opportunities, especially in primary focus areas and projects related to maintaining older adults in the community.

Over the past three decades the region has experienced a major transition from a manufacturing-based economy to one based on services, health care, and research. Many groups have been impacted by the changes in the economy, which have been intensified by the Great Recession which began in 2007. The unemployment rate in Monroe County currently stands at 6.3%, (NYS Dept. of Labor, July 2014). As people adjust to economic changes, they make use of services provided by nonprofits.

Simultaneously as demand increases, nonprofits in New York State have experienced decreases in fundraising revenue, donations and in grant funding from New York State. The result has been a decrease in staffing in some agencies and an increased need for local volunteerism to supplement the activities of remaining staff.

Our partnerships with volunteer stations (community nonprofit agencies) allow RSVP volunteers to

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help meet the various critical needs in our service area. We focus on working with and adding stations that meet the sponsor's (Lifespan) mission of aging services and particularly look for stations with measurable impact upon the community. We target our volunteer recruitment with an aim of placing RSVP members in programs which meet the standards of the Corporation for National and Community Service's strategic plan; that is to say within one of the six focus areas identified as national priorities. (Healthy Futures-our primary focus, Education, Veterans and Military Families, Disaster Services, Environmental Stewardship and Economic Opportunity). As of April 1, 2014 (beginning of this fiscal year), 81% of our RSVP members are engaged in an identified Priority Focus Area, either solely or as part of several service activities, meaning that we are able to capture measureable outcomes of their volunteer efforts.

Transportation to and from medical appointments is a key example of a service that is needed. Lack of access to non-emergency care leads to more serious health problems. Older adults are outliving their ability to drive, as evidenced by a spring 2013 survey of seniors served by Lifespan's Give-a-Lift program which revealed that 98% of respondents were able to maintain access to medical care mainly due to the transportation assistance offered by Give-a-Lift. 54% of RSVP volunteers contribute volunteer efforts to this consortium of 25 community stations, and provided 17,569 one way trips to medical appointments during our last RSVP program year, providing 19,241 hours. (Data from PPR Program Progress Report, 4/1/13-3/31/14). These numbers reflect the great need for this service in Monroe County. Please note that many of these volunteers also serve in other capacities as well such as volunteering with Meals on Wheels, as tutors, as Matter of Balance coaches, to name a few. Our volunteers also address needs of the aging community through participation as Ombudsmen, Financial Management volunteers, tax preparers, home delivered meals services, non-medical caregivers and friendly visitors, healthy behavior coaches to name a few all designed to help aging adults remain healthy and independent as long as possible.

We have a large number of volunteers who drive to and from their station assignments. With rising gas prices, this can cause a financial hardship, and result in curtailing volunteer service. Funds from this grant will be used for travel reimbursement for the volunteers. This component assists RSVP with both recruitment and retention of an engaged and active volunteer force.

Describe how service activities in the Primary Focus Areas lead to National Performance measure outputs or outcomes

RSVP in Monroe County mobilizes community resources at the volunteer and organizational level.

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The program seeks out not-for-profit organizations and programs that could meet identified community needs that fit into the CNCS Strategic Priority Areas. For example, the program approached tutoring and adult literacy programs about becoming volunteer stations for volunteer tutors to address the community need for support for youth and adults with low literacy. At the same time the program publicizes urgent volunteer needs in its publicity and communications to potential volunteers. The program emphasizes Priority Focus Area in its publicity and promotional ads. Monroe County RSVP has sound practices in place to ensure that data concerning performance outputs and outcomes are collected, analyzed and reported. Volunteer station MOUs include provisions for the regular collection of volunteer activity data and for the collection and transmission of data concerning program impacts to Lifespan. Statistics on service and impact are gathered from volunteer stations annually. The program coordinator in Monroe County RSVP collects data and enters it into the Volunteer Reporter database used by program to prepare reports for management purposes by Lifespan and for monitoring by CNCS.

Plan and infrastructure to support data collection and ensure National Performance Measures outcomes and outputs are measured, collected and managed

Project performance is measured in many ways. A system is in place at Lifespan for continual self-assessment and evaluation. The sponsor agency requires the completion of quarterly and annual reports on all RSVP outputs and outcomes. The data collected by RSVP in Monroe County is used by Lifespan to evaluate whether RSVP is fulfilling its CNCS contract goals and agency goals. The data is also used as a quality improvement tool to determine whether adjustments need to be made in recruitment strategies or in the development of PFI stations to meet CNCS expectations.

Data management is performed using the Volunteer Reporter database, as well as through the storage and archiving of required hard copies. RSVP relies on its stations to submit accurate volunteer time and mileage reports on behalf of volunteers. That data is inputted into the Volunteer Reporter database which enables RSVP in Monroe County to run various reports that help us manage 700+ volunteers.

RSVP in Monroe County also relies on the collection of data from stations for CNCS reports. Stations with Primary Focus Areas complete a form twice per year including data on progress toward their individual goals. This system has worked out well, and is made possible by clear communication about expectations with volunteer stations. RSVP in Monroe County works with stations to integrate RSVP reporting requirements into their own data collection systems and needs.

Volunteer Reporter is also used for some of the "softer" data collection needs as well, such as volunteer

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birthdays, targeted mailings by zip codes, etc.

In addition, Lifespan is dedicated to collecting relevant data to understand the populations it serves and to analyze the impact the agency's services are having on client lives and on the community. Each program collects demographic data, program output data and program outcome data using evidence-based measures when available. Data is compiled into quarterly reports and into an agency-wide annual program report for use by senior management and supervisory and other agency staff. The regular reporting and review of data by management forms the basis for Lifespan's continuous improvement program. Program results are used to make budget decisions, identify community needs and to make modifications to program models to improve service delivery and impact.

Activities in service to veterans and or military families as part of service in Primary Focus Area, other focus areas and capacity building

RSVP in Monroe County enjoys strong relationships with the sponsor organization, Lifespan, as well as with volunteer stations, RAAVS (Rochester Area Administrators of Volunteer Services) and an Advisory Council. All work together to insure community needs are identified, tracked, documented, and detailed. Communication among these organizations helps each group, as well as the community.

Lifespan has now operated the RSVP program in Monroe County for over 42 years. Lifespan is recognized in the community as a premier aging service provider and also as the source of older adult volunteers among the not-for profit network of agencies. In many cases organizations approach Lifespan about the placement of volunteers, both in impact-based programs and those that fall outside the CNCS priority areas. Lifespan RSVP gives priority to organizations that meet the six CNCS Strategic Priority Areas but is open to signing MOUs with other not-for-profits that represent a true community need and would add a variety of options for volunteers who choose not to pursue Strategic Priority Area opportunities. Lifespan RSVP also seeks out community partners that will serve as agents for meeting Strategic Priority Areas. For example, the current plan is to reach out to agencies that serve veterans, such as the local Veterans Outreach Center, to explore volunteer opportunities that would meet the Strategic Planning Area goal of service to Veterans and Military families. These community connections help RSVP monitor and improve program design and evaluation tools.

Recruitment and Development

Recruitment and Development

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Infrastructure to create high quality volunteers assignments with opportunities such as sharing life experiences, abilities and skills to improve their communities and themselves through service in their communities.

The mission of RSVP is to recruit and place volunteers in meaningful positions to meet community needs, provide a high quality experience for volunteers which can enhance their own quality of life, but also to support not-for-profit organizations in fulfilling their mission. In an era of limited finances and reduced budgets, organizations rely on volunteers to stretch their capacity to meet community needs.

This spring we introduce a new program- *When Everyday becomes Saturday*, as a part of a series called Information and Inspiration, during May in honor of Older Americans Month. This program is designed to provide the newly retired professional with ideas and insight to the possibilities volunteering with their new found free-time, while putting to use the skills they acquired on the job. RSVP receives many inquiries and referrals regarding potential volunteers, through phone calls, through web recruitment tools (e.g. VolunteerMatch), through our sponsor's website and through community advertisement. If the candidates are appropriate for our Primary Focus Areas, we invite them to orientation/information session, enroll them and offer appropriate placements. If they are not appropriate (for example, not age-eligible, not in one of our areas of focus, short-term volunteer), they are provided information about other agencies, including contact information. In some cases, with the candidate's permission, referrals are made to other agencies for follow up.

New volunteers often offer a specialized skill -- for example, many years of experience as an Accountant, which they may wish to use in an assignment. RSVP staff will then coordinate contacts with stations that may wish that type of service. Lifespan RSVP staff makes an extra special effort to match volunteers with stations that match their interests, abilities and experience.

RSVP serves the stations and community by being a resource for volunteer management material, information on volunteer impact, collection of data, and reporting guidelines. RSVP staff at Lifespan is available to volunteer stations for technical assistance and support.

Plan and infrastructure to ensure RSVP volunteers receive training needed to be highly effective means to addressing identified community needs in both Primary Focus Area and other focus areas or capacity building

RSVP in Monroe County believes that training and clear expectations for volunteers, volunteer stations and the Advisory Council are keys to the success of the program and form the basis for a

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productive and satisfying volunteer experience for all involved in the program. The program offers a solid orientation for everyone who wishes to become a volunteer. The orientation covers rules, regulations, opportunities and the strengths of the program. There is an opportunity to respond to prospective volunteer questions and to complete paperwork. Most importantly, the volunteers are given a presentation on types of opportunities available. They are encouraged to choose from Primary Focus Areas as well as opportunities in Other focus Areas and /or Capacity Building. The orientations often include a guest speaker from one of the sites. There is an abundance of information available to the volunteers, so they may make an informed choice that is beneficial for them. They have a chance to look through job descriptions and site descriptions, and talk with a current volunteer. Orientations are held twice monthly and on average, four people attend each orientation.

Volunteer training continues by the selected station of service or non-profit agency. Training varies from 2-4 hours for many Lifespan programs (transportation, non-medical care giving services etc.) up to 20 hours for HII CAP counseling and 36 hours for Ombudsman training. Other agencies/non-profits hold their training as individualized to the task which the volunteer will be doing. For example, Literacy Volunteers has a six part standardized Literacy Tutor Training, and those who wish to assist with Tax Preparation attend training held through AARP and the IRS. Many agencies hold continuing training for their volunteers. All of these efforts are designed to ensure volunteers are well equipped to perform their assignments in an effective and beneficial manner.

Demographics of the community served and plans to recruit a volunteer pool reflective of the community served

RSVP of Monroe County is cognizant that the region is comprised of diverse communities -- ethnic, religious, racial and economic groups. As a mobilizer, we reach out to a variety of groups so that we have a volunteer base that reflects the constituencies served by our partners. We participate in the "Volunteers in Living Color" fair which targets a multi-racial population, as well as a Volunteer Fair at a local city-based non-profit (C.A.S.H.) which targets low income, working, mainly urban residents. By partnering with the sponsor of other Senior Corps programs in the area, Lifespan's RSVP program facilitated a Matter of Balance Participant Class at an affiliated senior center, utilizing RSVP Volunteer Coaches, one of whom was fluent in Spanish and able to offer the program to Latino older adults. Lifespan uses a variety of strategies including multiple media outlets for raising awareness about the existence of the program and about specific volunteer opportunities. Publicity and advertising also serve as effective recruitment tools as indicated below in the Recruitment section. Lifespan RSVP builds public awareness through the distribution of a program brochure that is available in libraries,

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senior centers, other not-for-profit programs and locations where active older adults might congregate. RSVP has been featured in radio/TV interviews, media placements and community presentations. Newspaper and regional magazine ads and articles, including guest essays about volunteer needs and the benefits of volunteering, have appeared in the local mainstream press as well as in Pennysaver newspaper. Lifespan RSVP is included in a section of the agency website (www.lifespan-roch.org -- follow links for Services -- Mid-Life Adults). RSVP maintains a Facebook page for RSVP of Monroe County. Through the use of Constant Contact, RSVP routinely shares information with both volunteers and stations on opportunities, program updates, and statistics on volunteering. RSVP also offers a presentation in Lifespan's Information and Inspiration Series, a series of presentations on topics of interest to older adults which is offered two times per year and is open to the public without charge. RSVP is routinely included in presentations made by Lifespan staff to professional and general public groups about the services and programs the agency offers. Veteran and military family members serve in many volunteer capacities, the greatest number is in Transportation, at present the count is 54. Going forward, collecting information on Veterans served and serving in the volunteer capacity will be a focus through surveys and outreach.

Plan and infrastructure to retain and recognize the RSVP volunteers

RSVP utilizes a number of approaches to retain and recognize volunteers. In addition to the option of mileage reimbursement, a greatly appreciated advantage of RSVP membership, Lifespan RSVP also holds a number of recognition events. Our largest recognition event is the Annual Recognition Luncheon. Held in October each year, the event includes awards for outstanding service, door prizes, and special recognition of the Volunteers of the Year. Participants and awardees receive gifts, certificates, and verbal recognition, and listen to an inspirational keynote address. In 2013, 303 volunteers and station representatives attended the luncheon. The RSVP office also makes personal calls to all volunteers extending birthday greetings, and often sends cards/acknowledgement of achievements made by volunteers.

Membership in RSVP provides volunteers with recognition of their donated time and activities; it also provides a sense of connection to RSVP, Lifespan, the Rochester community, and the senior volunteer movement nationally. A sense of membership and partnership is promoted through our newsletter, opportunities for development of new skills and leadership opportunities, ongoing promotion of senior volunteerism in the community, workshops, and special events.

In early 2014, RSVP of Monroe County joined a local employee/non-profit discount program, which

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extends discounts on dozens of area products and services to all of our active volunteers through use of a discount card.

Program Management

Program Management

Management of volunteer stations in compliance with program regulations such as preventing or identifying prohibited activities

Oversight of all of the stations working with the Monroe County RSVP is a priority of the RSVP management team, and they go to great lengths to ensure each station has an understanding of their responsibilities and the responsibilities of the Lifespan RSVP Program.

As stations sign on with Monroe County RSVP, the director or coordinator reviews the MOU with station management. All federal compliance requirements and local RSVP program issues are explained. Monroe County RSVP management contacts stations periodically to review any questions or issues regarding volunteer performance, management issues or compliance with MOU requirements. If stations are found in major non-compliance, e.g. as the results of discrimination or use of volunteers to supplant regular staff, the local policy calls for immediate correction of the problem or discontinuation of the program as an RSVP station.

Plan to oversee stations to ensure that volunteers are performing their assigned service activities

A survey of the volunteers is administered every couple of years, to gain feedback from the volunteers on their experience and to make programmatic improvements. This feedback is used to help determine if a station is using the volunteers in the capacity identified in the established MOU.

Volunteers are followed up with by the coordinators and program director to ensure they are satisfied with their experience on a random basis.

Monroe County RSVP conducts ongoing monitoring of sites through on-site visits, phone contact and written reports of volunteer activity and outcomes that are completed bi-annually.

Your plan and infrastructure to meet changing community needs to include minimizing disruption to current volunteers as applicable and /or graduating stations as necessary.

RSVP in Monroe County has actively reassessed the roster of volunteer stations, focusing on stations that meet the mission of the sponsor agency, Lifespan (services to older adults), and education. In the coming grant period, RSVP in Monroe County will give priority to adding stations that fall within the six areas contained in the CNCS strategic plan. Currently RSVP in Monroe County includes stations

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that fall into the categories of Education, Healthy Futures, Economic Opportunities and Disaster Services. Plans are proceeding to connect with opportunities for volunteer station in the area of Veterans and Military Families. Certain work plans/stations have been „graduated“ (e.g. cultural heritage) with no adverse reaction.

RSVP in Monroe County reaches out to potential volunteer stations that could represent Priority Focus Areas, volunteer opportunities and also links with new community programs that fit within the mission and goals of the RSVP program. For example, The Senior Connection, launched within Lifespan through a CDC-grant research project calls for a large number of volunteers to be paired with depressed older adults. The project addresses an important community need; measurement of impact is built into the program design and RSVP involvement insures a recruitment source for volunteers.

Organizational Track record in the Primary Focus Areas measuring performance in the Primary Focus Areas

RSVP is sponsored by Lifespan of Greater Rochester, which has also sponsored RSVP of Monroe County for over 40 years. It has been a very positive and mutually beneficial partnership. Lifespan is Monroe County's largest nonprofit agency assisting older adults and their caregivers. Employing 100+ professionals in aging services, Lifespan has 41 years of experience in aging services and sponsors 30+ programs that serve older adults. Lifespan provides a number of services and programs in the Finger Lakes region outside Monroe County. Since 1998 the agency has provided elder abuse services in a ten-county area. It is also the Long Term Care Ombudsman provider in eight counties. It offers specific programs in Ontario and Genesee Counties and most recently, in 2011, launched a region-wide Finger Lakes Identity Theft Coalition. As noted previously, several of its programs have a focus on promoting physical and mental health and wellness among older adults. These include a Matter of Balance Falls Prevention Program implemented throughout Monroe County and Chronic Disease Self-Management Program which is also being implemented on a county-wide basis. The agency sponsors three senior centers which are nutrition sites. Lifespan also offers exercise and wellness programs as part of their regular activity schedule. One center is located within an urban YMCA. The agency partners with the University of Rochester Medical Center Department of Psychiatry to offer mental health programs aimed at addressing depression and anxiety among older adults. The agency also offers a unique geriatric addictions program in the area. Lifespan has a long history managing volunteers. The agency makes use of volunteer services in several programs, including RSVP volunteers. A total of 300+ volunteers are active in Lifespan programs. In 2013, the RSVP program in

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Monroe County had 855 active volunteers, documenting 76,971 hours in 61 different organizations. The agency has procedures and systems in place to collect data about volunteers and the activities they perform in all Lifespan programs. Lifespan RSVP in Monroe County has systems in place with all volunteer stations to collect output data and performance data as outlined in agency MOUs and the work plans submitted to CNCS for each program.

Plans to ensure project is in compliance with RSVP federal regulations, Advisory council, and MOUS and volunteer eligibility

As the sponsor, Lifespan provides excellent management of oversight of financial resources and administrative support to Monroe County RSVP. Lifespan's Accounting Department supports RSVP with budgeting reports, audits, accounts payable/receivable, and guidance in the management of the RSVP budget. Accounting is comprised of a Director of Finance and five staff members. Accountability checks are integrated into the system. Lifespan has a consistent record of successfully complying with the mandates associated with the use of federal grant funds. Monroe RSVP programs receive very positive results whenever audited by CNCS and by Lifespan's outside auditing firm. Lifespan's senior management, the agency Development Director and the Advisory Council have all been active searching for local opportunities to meet the matching requirements of the federal grant and to offer tangible recognition for volunteers. Monroe County RSVP has well developed policies in place that mirror CNCS polices and standards to ensure that resources are used responsible to meet grant requirements and to address community needs most efficiently. The evidence we are in compliance was demonstrated in our monitoring visit that occurred in May 2014, where the monitor found all of our systems to be in total compliance and there were no findings as a result of the audit. Monroe County RSVP has an active Advisory Council comprised of RSVP volunteers, business people and representatives from collaborating agencies. The Council structure includes subcommittees designed to work on specific topics or tasks. New members to the Advisory Council are asked to submit a letter of interest with a resume or list of attributes. They are also interviewed via phone or in person by RSVP staff, so that they are aware of the purpose of the RSVP Advisory Council and the commitment involved in serving as a member. All paperwork is forwarded to current members who vote on potential new members. Lifespan RSVP offers new Advisory Council members an orientation on the role of the council and its function in relationship to the operation of the program. Ongoing membership receive informal

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updates on RSVP in Monroe County at each quarterly meeting and in newsletters; more thorough annual updates detailing RSVP service statistics and changes in policy are also provided. Other changes or news are conveyed, as necessary, via email blast to Council members.

In addition the program offers Council members "refresher" training to all members periodically on expectations for the Council and how best the members can advise the program and support the operation of the program in Monroe County. Most recently the Council reviewed the By Laws to insure they are still relevant and to redesign subcommittees to meet the current needs of the program. Advisory Council agendas also include training and information on new programs, new stations and trends in volunteering.

Sub-committees also have a designated "advisor" for their area who participates in Committee meetings and offers guidance in their area of expertise, e.g., Lifespan's Director of Development acts as the advisor for the Resource Development Committee.

Organizational Capability

Organizational Capability

Plan and infrastructure to provide sound programmatic and fiscal oversight, day to day operational support to ensure compliance and ensure accountability and efficiency and effective use of available resources

Monroe County RSVP and Lifespan have well developed internal policies to guide the operation of the program. Agency finance policies ensure accurate monitoring and documentation of expenses, recording of cash and in-kind contributions that contribute to the agency match and timely submission of claim vouchers to CNCS. Internal agency and program policies were reviewed in a CNCS compliance visit in May, 2012. The report of the program and fiscal review identified language changes in the MOU, Letters of Agreement (for volunteer assignments that go beyond friendly visiting activities), and in written policies and procedures for assurances and certifications, that were required. Corrections were made by July 1, 2012 and the corrective action plan was approved by the NY State Program Director.

A compliance monitoring visit occurred in May 2014, and there were no findings during the review! Here is a statement from the Response Letter:

I am happy to report that The Monroe County RSVP was found to be in full compliance with Senior Corps legal, regulatory, and policy requirements. I thank you for your support of the program and for the valuable services that your volunteers provide to the community. Your staff is enthusiastic,

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engaged in the community, and supportive of the volunteers which is reflective of the high quality programming that you do. I was equally impressed with the support of the Advisory Council and their knowledge of Monroe County's community needs and how volunteers can best work to make a difference.

Programmatic oversight is provided by the Lifespan Chief Operating Officer who meets regularly with the Program Director and also chairs the Monroe County Advisory Council. She is also responsible for preparing program applications and recompetition proposals. Monroe County RSVP staff consult her and the agency President/CEO for major strategic planning decisions and critical incidents regarding the program. She and the Program Director are jointly responsible for achieving program performance goals and quality assurance in the program.

As the sponsor, Lifespan provides excellent management of oversight of financial resources and administrative support to Monroe County RSVP. Lifespan's Accounting Department supports RSVP with budgeting reports, audits, accounts payable/receivable, and guidance in the management of the RSVP budget. Accounting is comprised of a Director of Finance and five staff members. Accountability checks are integrated into the system. Lifespan has a consistent record of successfully complying with the mandates associated with the use of federal grant funds. Monroe RSVP programs receive very positive results whenever audited by CNCS and by Lifespan's outside auditing firm. Lifespan's senior management, the agency Development Director and the Advisory Council have all been active searching for local opportunities to meet the matching requirements of the federal grant and to offer tangible recognition for volunteers. Monroe County RSVP has well developed policies in place that mirror CNCS policies and standards to ensure that resources are used responsibly to meet grant requirements and to address community needs most efficiently.

Clearly define staff positions, identification of current staff assigned to project and how these positions ensure the accomplishment of the program objectives

Staff positions for RSVP Monroe County include the Program Director (Tammy Chmiel) at 30 hours per week -- the additional 7.5 hours are charged to another RSVP grant, two Volunteer Coordinators (Joanne Powers and Kathy Wood) at 15 hours and 7.5 hours per week respectively, and the Chief

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Operating Officer (Jody Rowe) at 1.5 hours per week. All are employees of Lifespan of Greater Rochester.

The Program Director is responsible for overseeing day-to-day operations, for budget preparation and monitoring, for direct supervision of the coordinator located in Monroe County, for recruiting and communicating with the Advisory Committee, and for interpreting the CNCS Senior Corps mission to volunteers and volunteer stations. Strategic planning is done by the Program Director and agency Senior Management with input from program staff and the Advisory Council.

Descriptions of Staff Positions Jody Rowe, Chief Operating Officer & Compliance Officer at Lifespan (.015 FTE to Monroe County RSVP) -- Jody provides administrative oversight and strategic planning for Monroe County RSVP. The Program Director reports directly to her. She chairs the Monroe County RSVP Advisory Council, participates in fundraising for the agency match and in budget preparation. She reviews reports and data collected by the program to ensure progress is being made in achieving contract goals. She also prepares grant applications and recompetition proposals.

Currently, Jody's responsibilities at Lifespan are oversight of all program operations including RSVP and Volunteerism. Jody holds a BS degree in Sociology and a certification in Gerontology.

Tammy Chmiel manages both the Monroe County (.80 FTE) and Livingston County (.20 FTE) RSVP programs. The Coordinator for Monroe County RSVP reports directly to her. She oversees day to day operation of the program; meets regularly with staff under her; communicates with Monroe County Advisory Board members and volunteers as needed; prepares and monitors the budget; leads planning for volunteer recognition events; joins with staff, the Advisory Council and Senior Management to develop strategies to recruit volunteers and meet output and impact goals for volunteers in Monroe County; oversees the development of new stations; oversees volunteer training; prepares reports and applications for grant continuation.

Joanne Powers and Kathy Wood, are both part-time coordinators for Monroe County (Kathy also works in Livingston County as the RSVP Coordinator 22.5 hours week), who conduct the day to day operations of the program and participate in program planning. They recruit and train volunteers and make station assignments. They make presentations to agencies, healthcare institutions, school officials and other likely volunteer stations. Joanne and Kathy collect data from volunteers and stations and enter it on a regular basis into the Volunteer Manager database.

Joanne was a former volunteer who loved the program so much she applied to work at Lifespan. She has years of experience in office management and administration. Kathy is also the volunteer

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coordinator for Monroe County RSVP, and holds a BA in Sociology. Her background with education, presentations, database management and her experience with volunteers and recruitment make her a valuable asset.

Develop and implement internal policies and operating procedures to provide governance and manage risk, such as accounting, personnel management and purchasing

Lifespan of Greater Rochester was incorporated in 1971 (as Monroe County Council on Aging) and has specialized in offering non-medical programs for older adults and their caregivers for 41 years. The organization maintains offices in a suburb of Rochester, close to the city line with convenient free parking and public bus service available to the site. The agency budget for 2014-2015 is \$7,687,000. RSVP staff are provided with office space at Lifespan offices in Rochester. Staff are provided with necessary office supplies, office furniture and equipment, internet and telephone access. Lifespan administration also provides key components of management including community relations, program development, financial management, human resources, computer support, facility management, and other supports for all its programs. Lifespan has well-developed internal policies and procedures to ensure sound fiscal practices and accountability in the management of agency budgets and funds. Contracts have been negotiated with office furniture, supply and equipment vendors to obtain preferred rates for program purchases. Purchase policies require multiple bids for large purchases. As a not-for-profit organization the agency is exempt for paying NYS sales tax on purchases. General ledger sheets are distributed to managers on a monthly basis for reconciliation of accounts on a regular basis. The agency hired a contract manager in 2012 to oversee compliance with contract requirements and to assist program managers with budget preparation and report preparation for funders. As a recipient of Medicaid Funds, Lifespan is required to implement a Corporate Compliance policy for all its programs, including Monroe County and Monroe County RSVP. The most recent agency audit, for 2011-2012, found no material deficiencies and made only minor recommendations for changes in procedures. The agency also provides each employee with a copy of personnel policies to ensure uniformity in the application of personnel practices and adherence to applicable labor laws and nondiscrimination policies. Lifespan has an HR Director who interprets personnel policies for staff and is available to all levels of staff for personnel issues.

Demonstrate organizational infrastructure in the areas of robust financial management capacity and system and past experience in managing federal grants.

Lifespan Senior Management includes the President/CEO, a Chief Operating Officer, a Vice President

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for Programs, and Vice President for Marketing Communications, a Controller and an HR Director. Responsibility for clinical and administrative supervision of program managers is distributed among Senior Management staff. Senior management meets on a weekly basis to review program issues, current projects, strategic plans, funding opportunities, etc. In addition to individual supervisory conferences, Program Managers meet as a group with Senior Management on a biweekly basis. The agency sponsors all-staff meetings semiannually. Lifespan has extensive experience managing federal funds. In addition to successfully managing RSVP funds for the past 40 years, the agency has received grants from CMS, DOJ and AoA. In 2007, the agency was awarded a Department of Justice grant to develop a curriculum and to train law enforcement officers in the area of elder abuse. In 2004 and 2010 federal funds (earmarks) were received through the Administration on Aging to convene Statewide Elder Abuse Summits in New York. Most recently Lifespan was named as the grantee by the Centers for Medicare and Medicaid Services to serve as the fiduciary and lead agency in a health care project involving a consortium of healthcare facilities designed to reduce hospital readmissions of Medicare recipients in Monroe County. In all cases the agency has been found upon fiscal audit to be a responsible steward of federal funds.

Other

NA

PNS Amendment (if applicable)

NA