

# Narratives

## Executive Summary

Old Colony Elder Services (OCES) is a new applicant for CNCS funding. OCES will acquire the Mayflower Retired and Senior Volunteer Program, Inc. (MRSVP Inc.) and will serve as the Sponsor Agency for the RSVP Senior Corps Grant (Project). OCES is designated as one of 27 private non-profit Aging Services Access Points (ASAPs) in the Commonwealth of Massachusetts and our mission is to support the independence and dignity of elders and individuals of all ages with disabilities by providing essential information and services that promote healthy and safe living. OCES' dynamic programming, 40-year history and experience, as well as our commitment to support people of all ages, will place us in an excellent position to manage this Project.

We are requesting the Corporation for National and Community Service (CNCS) federal investment of \$126,132 (annual federal grant amount) which will be supplemented by \$61,905 (non-federal resources) for a total budget of \$188,037. Our Project plans that 400 unduplicated Project volunteers will serve approximately 20,000 hours this year, and subsequent two years of the continuation grant. The primary focus areas of this Project are Healthy Futures: Aging in Place and Obesity and Food; and Economic Opportunity: Financial Literacy and Money Management. Other areas of focus include School Readiness, K-12 Success, Veterans and Families, At-Risk Ecosystems, and Disaster Assistance. Through our service partners, we anticipate providing over 150 service opportunities to our volunteers annually. Examples of service activities include feeding the hungry and homeless by volunteering at food pantries and delivering home delivered meals; mentoring children; assisting in administrative capacities; clearing walking paths; and helping individuals establish and maintain monthly budgets and paying their bills.

At the end of the three-year grant, the expected outcomes of our volunteer services are three-fold - 1) to offer meaningful volunteer opportunities to volunteers age 55 and older that provide personal fulfillment by utilizing their life skills and experiences; 2) to assist service partners in fulfilling their missions to improve the quality of life for Plymouth County citizens in need; 3) to make a measurable impact on areas identified as critically important, in particular in the primary focus areas of Healthy Futures and Economic Opportunity. In addition, we anticipate that the 400 volunteers will serve over 6,500 individuals! Outcomes will be measured through questionnaires, surveys and attendance sheets as required by various programs and funding sources.

## Strengthening Communities

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MRSVP Inc.'s service area (MA-02) encompasses all of Plymouth County which includes Abington, Bridgewater, Brockton, Carver, Duxbury, East Bridgewater, Halifax, Hanover, Hanson, Hingham, Hull, Kingston, Lakeville, Marion, Marshfield, Mattapoisett, Middleborough, Norwell, Pembroke, Plymouth, Plympton, Rochester, Rockland, Scituate, West Bridgewater, Wareham, and Whitman. OCES' service area is compatible with this as 20 of these towns are within our service area, and we have relationships with community organizations in the other 7. Our reputation, extensive network and community connections make us highly visible in our large service area. The sponsoring agency, OCES was founded in 1974 and has over 184 employees that encompass a variety of cultural and language needs. We operate more than 15 programs serving elders, individuals with disabilities, their families and caregivers.

MRSVP, Inc. was created 41 years ago to mobilize volunteers in alliance with service partners to bring about the change people seek in their lives. MRSVP Inc.'s mission is to engage the Project's volunteers, age 55 and over, in service activities that bring about the changes communities need. This Project and OCES are strategically positioned to address issues of critical importance in Plymouth County and we anticipate reaching over 400 Project volunteers who will serve an impressive 20,000 hours annually in our community.

Plymouth County, approximately 1,093 square miles in Southeastern Massachusetts, is made up of 26 towns (ranging in size from 4,000 to 58,000 residents) and the city of Brockton with approximately 94,000 citizens (2013 census). The area runs 28 miles along the Massachusetts coast line and inland by about 25 miles between Boston and Cape Cod. Total population in the County (2013 census) is 501,915 of which 26% or 130,743 are age 55 or older. Males comprise 45% of the 55+ population, or 59,397, and females comprise 55% of the 55+ population, or 71,346. The city of Brockton and the inland towns of Bridgewater, East Bridgewater, West Bridgewater, Rockland, Halifax, Pembroke, Hanson, Lakeville and Middleborough have the highest proportions of residents 55+, along with the coastal towns of Plymouth and Wareham. The population in Plymouth County is mostly white (87% in 2013), with African Americans making up approximately 10% of the population, Hispanics (of any origin) less than 4%, and all others just over 3%. Only the city of Brockton contains higher percentages of non-white residents.

According to the "Long-term Population Projections for Massachusetts Regions and Municipalities"

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prepared by faculty at the University of Massachusetts Donahue Institute for the Office of the Secretary of the Commonwealth of Massachusetts, "By 2030, baby boomers will move into the retirement phase of their life cycles. Although some older residents will retire outside the region [i.e., the Southeastern region of Massachusetts including Plymouth County], these will be eclipsed by those deciding to age in place, shifting the entire population distribution upward." By 2030, the report projects that there will be approximately 193,000 males over the age of 55 and 228,000 females over the age of 55 in the region for a total of 421,000 in the Southeastern region of Massachusetts, which includes Plymouth County. Based on the above census and research information, there is a great need within Plymouth County for the Project to focus on Healthy Futures and Economic Opportunities.

The United Way of Greater Plymouth County recently conducted a Community Needs Assessment that indicated the local issues that also reflect national concern are early childhood development, personal and public safety, and access to health care. Our work plans and new station outreach are designed to address these specific issues in addition to our primary focus areas.

The strength of the Project, its plans and the program infrastructure allows staff to effectively and efficiently manage volunteers and service partners. The service activities carried out by volunteers are designed around community needs in primary focus areas - Healthy Futures: Aging in Place and Obesity and Food; and Economic Opportunity: Financial Literacy - and are in keeping with the Corporation for National and Community Service performance measures. The Project will engage in service activities to support 900 homebound individuals or older adults and individuals with disabilities by providing them food, transportation or other services to support their ability to live independently. 720 homebound and/or older adults and individuals with disabilities will report having increased social ties and perceived social support. 1,500 individuals will receive emergency food from food banks, food pantries and other nonprofit organizations. Overall, the service activities that will be performed by volunteers in the Primary Focus Area of Healthy Futures will lead to an increase in seniors' ability to remain in their homes safely, with the same or better quality of life. In addition, the Project's Volunteers will engage in service activities that will support individuals that have limited access to food by providing them with increased access to nutritious food.

Some seniors need support aging in place which our volunteers can provide and others want meaningful activities to engage in to support others and to give back to their communities. This

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Project will develop and provide both of these opportunities. OCES recently asked staff to complete a Volunteer Needs Assessment to determine what the volunteer needs were to support their current consumer base. The areas of greatest needs were in assisting with completing applications for housing, food stamps, and friendly visits among other things which are directly related to the CNCS primary focus areas. OCES has extensive relationships with local housing authorities throughout Plymouth County and manages 6 housing programs which will be good opportunities to provide volunteers with access to consumers in need; these would also be consistent locations in which volunteers could serve. This is one example of how the Project can meet the needs of individuals in Plymouth County. The Project's volunteers will benefit by living active, meaningful lives through their volunteer work. Indeed, a growing body of research shows an association between volunteering, and mental and physical health benefits. In particular, older volunteers report lower mortality rates, lower rates of depression, fewer physical limitations, and higher levels of well-being. People need to have meaning in their lives, and volunteering provides that deep, substantial meaning while leading to new discoveries and new friends.

The Project will engage volunteers and service partners in meaningful, impactful work for each of the National Days of Service (9/11 National Day of Service and Remembrance and the Martin Luther King, Jr. Day of National Service) as well as National Volunteer Week. Volunteers will write letters to the troops and wounded warriors. This activity will be duplicated for upcoming National Days of Service. We see this as a way to further participate in CNCS' mission to assist military families and veterans, raise our visibility, and engage new volunteers in the exciting and meaningful work of our organization.

By aligning the mission of MRSVP Inc. with OCES, and combining our staff and agency experience, elders and individuals with disabilities will benefit from a stronger, larger and more effective volunteer force to meet the above identified needs. We will be providing 400 volunteers an opportunity to assist approximately 6,500 clients, individuals and families throughout Plymouth County. Combining our reputation and networks throughout Plymouth County will also lead to an increase in service partner agencies providing us with a wide array of volunteer opportunities and a greater selection of culturally diverse opportunities which is vital in supporting this particular community.

The Project's Advisory Council will consider programmatic recommendations of the Project Director.

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Programmatic priorities will be based on the requests from service partners for the Project's volunteers. The service partners will be recruited in response to the regional needs identified in periodic Community Needs Assessments, most regularly conducted by United Way of Greater Plymouth County as mentioned above. A grant application review process will occur before the RSVP Project Director submits program areas to CNCS for funding consideration. The process will require the Project's Advisory Council to review proposed program areas for the upcoming year with the RSVP Project Director to ensure the program areas are in alignment with the community's needs as well as CNCS.

Working together with service partners and assessing data from various community needs assessments will allow us to address issues involving the most vulnerable of populations. Our service partners will continue to include Councils on Aging (COA), elder service organizations, hospitals, public schools, municipalities, food warehouses and pantries, homeless shelters, environmental groups, and veteran's agencies/organizations that serve military families. Partnerships will be defined through a Memorandum of Understanding (MOU) reflective of the CNCS regulations, and job descriptions that meet the needs of the service partner, while addressing the needs of their clientele.

Our relationships with service partners will continue to increase their capacity to deliver targeted results and address documented needs. OCES' RSVP Project Director, along with the Project's Advisory Council, will continue to work to address the service partner's needs within the National Primary Focus Areas. We will continue to develop tools to monitor each activity's effectiveness and provide data for tracking continuous improvement. We will employ a variety of methods to ensure that the National Performance Measure outcomes and outputs are measured, collected, and managed. We will ensure that all Project Volunteers fill out necessary enrollment forms which will continue to be maintained in a secure database known as Volgistics. Volgistics will maintain service partner information in addition to the Project having service partner MOUs and enrollment forms to maintain compliance. To ensure that all active volunteers are meeting requirements of the Project, they will be required to submit timesheets on a regular basis which will also be entered in Volgistics to track volunteer hours and activities. By recording this information in the Volgistics System, the RSVP Project staff will be able to run reports to assess and ensure that the outcomes and outputs are collected and managed, and to track the amount of unduplicated volunteers providing assistance within each work plan. We anticipate that the number of unduplicated Project Volunteers serving in a

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National Performance Measure outcome work plan will exceed the CNCS minimum requirement of 10%. In addition to Volgistics, the Project will continue to utilize a system known as Donor Perfect to manage and track funds raised through fundraising. This system will also allow us to run reports to ensure that we are working successfully to meet our financial match. As MRSVP Inc.'s proven track record has ensured that these systems are efficient and that they ensure CNCS compliance, OCES will continue to utilize these systems.

Service partners will continue to work with our Project because we are committed to providing a dedicated, consistent volunteer corps who provides meaningful, impactful work that helps partners fulfill their missions and serve our community. Service partners appreciate that we offer and will continue to offer Project Volunteers benefits such as insurance and recognition of volunteers who meet the criteria for the Presidential Volunteer Service Awards. Some of the Project's service partners such as Beth Israel Deaconess Plymouth and the COAs have been with our Project for more than 35 years; this demonstrates that our Project and Service Partners are, and will continue to be, stronger as we work together to improve lives in Plymouth County.

### **Recruitment and Development**

The Project's mission is to work with service partners and recruit and interview volunteers age 55 and older, and align their abilities and interests to meet the needs of the community as provided by the service partners. Each volunteer will have a personal interview with the Project's staff to support them in identifying a placement that will align their interests, abilities and skills with service partners who are committed to ensuring a worthwhile volunteer experience while meeting community needs within the CNCS focus area framework. This process will ensure high quality volunteer assignments and satisfied volunteers.

The Project will utilize a variety of ways to ensure that the volunteer pool will be reflective of the needs of Plymouth County. As previously mentioned, OCES and MRSVP Inc. have extensive networks to support our activities throughout Plymouth County. We will rely on relationships with community based organizations to support our outreach efforts to recruit individuals from diverse races, ethnicities, sexual orientations, or degrees of English language proficiency. We will utilize organizations such as the Cape Verdean Association, Catholic Charities, Salvation Army, local health centers such as Brockton Neighborhood Health Center, among others to reach out to these various cultural groups. In addition, OCES has a Cultural Competency Committee that is utilized to identify

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the cultural needs of our community which will be an asset to this Project. Veterans and family members will be recruited in a number of ways. The Project will continue to partner with the Veterans at the Pinehills Plymouth Group which has approximately 100 members total. The Project currently has 24 enrolled volunteers with this group and we anticipate that this number will increase to offer continued support to service projects relating to the 9/11 National Day of Service and Remembrance. We will continue to strengthen our relationship with the Veterans Services of Brockton as they have been and will continue to be a service partner of the Project. We will work with their Veterans Director to recruit veterans to serve as volunteers assisting other veterans in need. These efforts will also leverage OCES' community connections with the Brockton VA as part of OCES' Veterans Independence Plus and Aging & Disability Resource Consortium programs. In addition, the Project will utilize assisted living center service partners such as Emeritus Assisted Living and Stafford Hill Assisted Living to recruit volunteers and clients that have age related or other disabilities.

As part of a planned strategy to position the program for growth, volunteer opportunities will be advertised in print-media, on local cable TV, and internet calendars of events. We will continue to publish these opportunities in a monthly calendar of activities to encourage existing volunteers to participate and bring a friend - a prospective RSVP volunteer.

We will continue to utilize one-day service opportunities, such as the National Days of Service (9/11 National Day of Service, MLK, Jr. National Day of Service) and National Volunteer Week in our calendars to engage volunteers with limited time; to encourage prospective volunteers to try a new service; and to bring in those who are curious about the RSVP Project and volunteerism, as they may be interested in long-term service assignments.

As part of our own development of skills-based volunteer opportunities for "Baby Booming" RSVP Volunteers, we will hold volunteer fairs (4 scheduled per year) at 55+ living communities. We will continue to offer these fairs as they have been proven to be effective in recruiting new volunteers.

Online recruitment will be completed through [Volunteermatch.org](http://Volunteermatch.org), [Volunteersouthcoast.org](http://Volunteersouthcoast.org), our website, our newsletter, through social media, through National Days of Service, at business expos and volunteer fairs. Project brochures will be located in every library in Plymouth County, as well as at our service partner agencies. Current service partners display the "RSVP Volunteers Serving Here"

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poster, and we will continue to encourage volunteers to wear their RSVP nametag, a Senior Corps badge, and, if applicable, their President's Volunteer Service Award pin. We will continue to raise our visibility through newspaper and magazine articles. Project staff will continue to make a special effort to be present at Commonwealth of Massachusetts' Jobs and Veterans Career Center Fair which is held quarterly in Plymouth, to engage retired veterans in volunteerism.

To ensure RSVP volunteers receive adequate training to be effective in addressing identified community needs, MRSVP Inc. developed the recruitment and training of volunteers for the Senior Citizens Assistance/Independent Living Capacity program which we will continue to use. Through this program, volunteers monitor their clients receiving home-based services to ensure needs are met. The "Providing Independent Living Support: Training for Senior Corps Volunteers" curriculum developed by CNCS will also be used to train volunteers for the Senior Citizens Assistance program. In addition to this curriculum, we will utilize specialized training programs to ensure that specific program needs are met. An example of this would be the specialized training that Money Management Program (MMP) Volunteers and OCES Board Directors will continue to receive. OCES has managed Nutrition Program volunteers for more than 30 years and MMP volunteers for the last 10 years. OCES provides annual training, as well as regular ongoing programmatic updates, to its Board Directors.

We will expand short term volunteer opportunities and on-going training opportunities for staff and volunteers. To support our 60+ service partners and 400+ volunteers, the Project Director, Volunteer Coordinator and volunteer team leaders will make periodic service partner site visits when the Project's volunteers are engaged in activities. Although we will have some volunteers withdraw or have undocumented history in the past year, we will support a corps of 400 volunteers in FY2015 as our volunteer base will expand due to our merger by adding at least 100 additional volunteers to our base to compensate for those individuals that graduate.

MRSVP, Inc. retains and recognizes the Project's volunteers in many ways. MRSVP, Inc. serves as the Plymouth County nominating station for the Presidential Volunteer Service Awards (PVSA) and OCES anticipates continuing this into future years. Volunteer recognition through the PVSA program also helps retain volunteers. The Project presents awards to approximately 10 - 20 volunteers annually at an event where at least 250 guests are in attendance. In addition to this annual fall event, OCES

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organizes an annual "Volunteer Appreciation" event every spring.

### Program Management

For the past 41 years, the Project has placed volunteers in assignments where their help is needed most in assisting Plymouth County's most vulnerable populations. Working with Councils on Aging the Project has served elders with food insecurity and other needs for our entire history; this substantiates Healthy Futures as our Primary Focus Area and a priority in our programming. The Project is designed to ensure management of volunteers and service partners in compliance with CNCS regulations. In addition, the Project negotiates each Memorandum of Understanding (MOU) with new and renewing service partners every three years to reflect the nature of our shared responsibility, paying particular attention to the six focus areas identified by the CNCS, and the areas in which we can have the most impact. We recruit new service partners whose mission addresses these areas of need.

Service partners with volunteer activities created prior to the institution of CNCS' focus areas have been maintained to support volunteers that were initially placed by the Project. We have not recruited new volunteers for these positions since they do not constitute focus area service activities and we will graduate these volunteers. In order to minimize any disruption to these volunteers, they will be offered other service opportunities that are within CNCS' focus area or they can maintain their position and be counted as a volunteer outside of the Project. It will be up to the volunteer what capacity they will serve in. The Project Director will continue to recruit new service partners to increase capacity to meet CNCS focus areas. The Volunteer Coordinator will be responsible for ensuring that volunteers in graduated stations have an opportunity to fill these positions or to fill them with new Project Volunteers. The Volunteer Coordinator will closely monitor these opportunities with the RSVP Project Director to ensure any transition made will be seamless for the Project, Volunteer, and service partner. Service partners not matching focus areas whose volunteers have graduated will also be graduated.

With the assistance of the Project's Advisory Council, Project staff will define roles and expectations among stakeholders for each new service activity and the means to evaluate them. Best practices, as shared by the members of our statewide Massachusetts Senior Corps Association meetings are in alignment with CNCS requirements. The Project's staff has attended these meetings and reviewed all of these practices on a quarterly basis. This is an excellent way to maintain efficient practices and will

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be continued going forward. The Advisory Council will also review programmatic recommendations of the Project Director. Recommendations will be reviewed and approved to ensure the Project is in compliance with federal regulations and to ensure the Project's Volunteers are placed in stations that have signed the required MOU. In addition to the experience that the Project's Advisory Council has, OCES utilizes a Money Management Advisory Council and a Board of Directors to ensure that community needs are being identified and addressed. All Members of these groups have experience and are knowledgeable about human services and make competent recommendations to support all programs. This combined experience and skill set will be an asset to ensuring success of this Project.

Both the RSVP Project Director and Volunteer Coordinator have extensive experience in recruiting and supporting service partners and volunteers. They will work collaboratively to ensure that service partners are providing appropriate placement opportunities and to ensure that the volunteers are meeting all expectations of the CNCS grant and service provider needs. The Volunteer Coordinator will work directly with the volunteers to support their training needs and to ensure that they are aware of program expectations such as completing and submitting timesheets. It is also important to note that the Volunteer Coordinator will ensure that job descriptions are up to date. The Project's staff will all be supported by a Community Programs Director who has experience in developing a variety of community based programs. Communication and support among volunteers, service providers, and the Project's staff are vital to ensure that all program outcomes are achieved and to ensure that all volunteers and service providers are satisfied with the opportunities offered.

The Project has a proven positive track record with CNCS, has met or exceeded most performance measures (with the exception of 1), and has successfully completed and submitted all reports. This track record will be further improved due to the April 1, 2015 merger with OCES as the financial structure and match will be maximized and the pool of volunteer opportunities and service partners will expand. Management support will be increased further improving efficiencies in volunteer and service partner recruitment as well as in other administrative functions.

### **Organizational Capability**

As previously mentioned, OCES is acquiring the MRSVP, Inc. The Project's current volunteer and service partner base will expand due to OCES acquiring MRSVP, Inc. on April 1, 2015. This expansion will make it easier to reach the Project's program goals and benchmarks. The increase in volunteers may also lead to increased funding as some of the OCES volunteers are not currently known to the

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Project. In addition, the acquisition will complement our existing programs and services that help seniors stay active and healthy, while leveraging and advancing the work, experience and strengths of the 41-year old Project.

For 40 years OCES has been providing individuals residing in southeastern Massachusetts with exemplary services and support, ensuring their dignity and independence, while maximizing their quality of life. OCES is privileged to act as the entry point for elders, individuals with disabilities, families, caregivers, volunteers and healthcare professionals who wish to access programs, services and community resources. Our staff members coordinate and/or provide a wide range of services. A few examples of OCES' direct services include:

- \* Information and Referral;
- \* Interdisciplinary Care Management (intake, assessment, development, implementation and monitoring of service plans and reassessment of needs);
- \* Protective Services (investigations of abuse and neglect of elders);
- \* Nutrition;
- \* Healthy Living;
- \* Housing Programs;
- \* Money Management; and
- \* Family Caregiver Support.

OCES is committed to supporting people of all ages in our community! Our dynamic programming, 40-year history and experience, as well as our commitment to support people of all ages, places us in an excellent position to manage the RSVP Senior Corps Grant.

MRSVP, Inc. staff is well-acquainted with RSVP and CNCS regulations and regularly attends program specific training provided by the National Senior Corps Association, Points of Light Foundation, the Massachusetts Service Alliance and the CNCS, either through conferences and/or webinars, and conference calls. Policies and procedures are determined by utilizing the RSVP Operations Handbook and the suggested volunteer enrollment forms, and the use of a checklist of compliance measures for volunteer intake. Volunteer records are stored in a secure environment, and data is stored in Volgistics, a volunteer and service partner management database. Service Partner MOUs and enrollment forms

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are also in compliance with the RSVP Operations Handbook. Service partners perform CORI checks on volunteers prior to placement. New volunteers and Service Partners receive welcome packets with necessary documents and information. Volunteers also receive a Volunteer Handbook. All of these procedures will continue to be utilized going forward.

In addition to strong internal policies and procedures, the Project will be supported and overseen by a strong organizational structure to ensure compliance and to ensure that the Plymouth County's needs are being met. OCES is led by a strong Board of Directors and a highly effective Executive Director who have guided the organization through a myriad of challenges and opportunities. Among these are the purchase and renovation of the building occupied by OCES, increasing numbers of elders in need of service, greater complexity in the needs of these participants, program growth and enhancement, and funding cuts at the state and federal levels.

The Board of Directors is comprised of representatives from 23 communities in Plymouth County (Abington, Avon, Bridgewater, Brockton, Carver, Duxbury, East Bridgewater, Easton, Halifax, Hanover, Hanson, Kingston, Lakeville, Marshfield, Middleboro, Pembroke, Plymouth, Plympton, Rockland, Stoughton, Wareham, West Bridgewater, and Whitman), many of whom are nominated by town agencies including the Councils on Aging. In addition to ongoing policy development and oversight typical to most Boards of Directors, OCES board members solicit opinions from their communities and identify issues that should be brought to OCES' attention. At least 51% of OCES' Board members must be no less than 60 years of age. Many are COA members and serve on various board committees. Board members are responsible for providing direction in planning, operation and evaluation of OCES programs and infrastructure.

In addition to the Board of Directors, OCES will utilize the Project's Advisory Council to ensure that the vision and goals of the RSVP Project are maintained.

Members of the Project's Advisory Council will serve on individual ad-hoc task groups created for researching or implementing specific programming initiatives, such as Recognition, Evaluation, and Volunteer Development with other members from the community who have particular skills and interests to share in the initiative.

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Diana L. DiGiorgi is the Executive Director and has served the OCES population since 1996 when she was hired as OCES' Finance Director. DiGiorgi brought 15 years of finance, management and marketing to the organization and has further honed those skills to the benefit of OCES. DiGiorgi has a Bachelors of Science in Accounting from the Rochester Institute of Technology and an M.B.A- Executive Program from Northeastern University. Under her guidance, OCES is financially healthy and has a strong presence in Plymouth County.

Nicole M. Long, a Licensed Independent Clinical Social Worker, is OCES' Community Programs Director. Long has been with OCES since 2005 and oversees OCES' Volunteer Programs, Housing Programs, and other community based initiatives for OCES. Long has a Bachelor of Science in Social Work with a Minor in Criminal Justice from Messiah College and a Masters Degree in Social Work from Bridgewater State University.

Darcy H. Lee is currently the MA-02 RSVP Project Director. When MRSVP, Inc. is acquired by OCES on April 1, 2015, Lee's title will be OCES' Volunteer Programs Manager/RSVP Project Director. Lee has more than 24 years experience in nonprofit management and government service, most recently as the Executive Director & COO of Mayflower RSVP, Inc. She served as the Principal and CEO of the fundraising consulting and nonprofit management firm Alden Charles Associates. As Chief Development Officer for the Center for Women & Enterprise, Lee managed a team of professionals and volunteers who raised more than \$1.7 million annually for services in Boston and Worcester, Massachusetts, and Providence, RI. As Campaign & Development Director at Pilgrim Hall Museum, Lee successfully directed the museum's \$3.4 million capital campaign over goal. As the Director of the Clark University Fund, Lee directed a \$2.1 million annual fundraising program from a worldwide constituency. Lee began her career at the JFK Library and Museum in Boston, and served on the staff of the JFK Library Foundation where she was part of the team that produced Distinguished Foreign Visitor Events, the Profile in Courage Award, and the 1993 Re-Dedication of the Museum. She also served as Press Aide & Federal Grants Coordinator for U.S. Senator Edward M. Kennedy. In each of her professional capacities, Lee managed upwards of 50+ volunteers for events and programs. Lee is a member of many professional organizations, including the Association of Fundraising Professionals, the Alliance for Nonprofit Management, and the Massachusetts Nonprofit Network. She was honored as a Paul Harris Fellow from Rotary International, and is an active community member in Plymouth, Massachusetts. She received her BA in History from Marymount College (Fordham University).

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Brenda Carrens is OCES' Volunteer Coordinator. During her 8 years with OCES, Carrens has coordinated the Money Management Program and Volunteer Program. She has worked in the Development Department performing such tasks as fundraising and event planning. Carrens is a member of professional groups including Association of Fundraising Professionals and Metro South Chamber of Commerce. She is a Board Director of CABbies, a 501(C)(3) fundraising group to support cancer patients. Carrens' volunteer experience includes such things as Scout Leader, Meals on Wheels and PTA Board member. Carrens is a past Board Director and volunteer Fundraising Coordinator for Brewins Youth Hockey. Carrens worked 9 years for First Trust and The Affinity Group (FiServ) as an Auditor/Researcher, then as Supervisor of an Account Service Team where she directed Client Service Representatives, Auditors, Researchers, Brokers/Traders, and other professionals managing accounts. Working with the Training Department, Carrens delivered a 2-day seminar to professionals in New York City. The Affinity Group was created and FiServ moved 5 staff members, including Carrens, to manage the new company. She over-saw Regulatory Reporting, AP/AR, Qualified Plans and Special Projects; she was a member of the Acquisition Team and coordinated the transfer-in of the largest acquisition. Carrens received her B.B.A. in Finance from the University of Texas, El Paso; additionally, she received a Certificate in Aging from the Institute for Geriatric Social Work at Boston University.

Sue Carlson is the Project's Office Administrator. When MRSVP, Inc. is acquired by OCES on April 1, 2015, Carlson's title will be OCES' Volunteer Program Assistant. Prior to joining Mayflower RSVP, Inc. in January 2014, Carlson worked in administrative positions at South Shore Hospital, including several years in the Charitable Foundation office and with The Friends of South Shore Hospital membership services. She focused on database management and online fundraising programs among her many office responsibilities. Previously, she was a corporate communications assistant at Serono, Inc. and has extensive experience in the planning, promotion and on-site operations of medical conferences and corporate meetings. Carlson has a B.S. in Marketing from Bentley University.

As indicated in the Financial Management Survey, OCES' Finance Director has a Bachelor's of Commerce in Accounting and more than 10 years relevant experience; OCES' Accounting Supervisor has a Bachelor's in Business Administration with an Accounting major, and 33 years related experience.

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Over the past 40 years, OCES has grown to a \$32 million organization operating more than 15 programs with 184 employees. We have managed programs with Title III federal funding since 1979 as well as HUD federal funding since 2012. In 2004, OCES created a subsidiary LLC to purchase and maintain its headquarters building in Brockton, MA. These details as well as other narrative sections and related required documents demonstrate OCES' sound programmatic and fiscal oversight, organizational capacity to develop and implement policies and procedures, and successful management including that of capital assets.

### **Other**

N/A

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

The PNS Amendment is not applicable.