Welcome to Module 3 for RSVP: Volunteer and Station Management. If you have not reviewed the NPDO Overview presentation, Modules 1 and 2, and NPDO Syllabus, please do so before you start this presentation.
Prior to starting this presentation:
- Review your Memorandum of Understanding template
- Review the Recruitment and the Strengthening Communities sections of your current grant
- Review the NPDO Syllabus for other Module 3 Preparation Activities

The red arrow will indicate that there is more information on the topic in the Syllabus.

The New Project Directors’ Orientation Syllabus provides the information you will need to complete the NPDO curriculum. Please complete the activities before starting this presentation.
Module 3 Objectives

By the end of Module 3, you should be able to:

- Understand the how Performance Measures affect project management
- Determine the quality of your MOUs and Volunteer Enrollment forms
- Identify appropriate volunteer stations and volunteer assignments
- Determine the quality of your Volunteer Assignment description
- Understand the benefits available to your volunteers
- Understand the value of community partners and collaborations with other national service projects.
Working with Volunteers and Volunteer Stations is a central focus of RSVP Project Directors' responsibilities. In Module 3 we will not cover every aspect of volunteer and station management but will focus on important requirements, common compliance findings, and resources for effective practices. The Senior Corps peer-to-peer networks, including, your state networks are valuable resources for sharing best practices.
Module 3: RSVP Volunteer and Station Management

Performance Measures
CNCS has adopted Agency-Wide Performance Measures that are implemented in all CNCS for National & Community Service funded programs. CNCS’ Performance Measurement framework provides a common focal point for CNCS' work across all programs and initiatives. Every CNCS Program will contribute to the Priority Measures. You can find links to more information about Performance Measures and how to implement them in the NPDO Syllabus. In Module 3 Performance Measure will be discussed in relation to managing stations and volunteers.

Managing volunteers and volunteer stations is central to successfully meeting your performance measures. It is important to address your project’s approved performance measures when working with volunteers and volunteer stations.
RSVP Performance Measure Requirements

- **Primary Focus Area**: RSVP programs are required to place unduplicated RSVP volunteers in one of the six CNCS priority focus areas, which includes Education, Healthy Futures, Economic Opportunity, Veterans and Military Families, Environmental Stewardship, and Disaster Services.

- All other remaining unduplicated RSVP volunteers may be placed in work plans in a combination of designated Agency-Wide Priority Measures, Complementary Program Measures or Other Community Priorities. Other Community Priorities work plans are created by the grantee to address community activities not captured by performance measures.

- **Outcomes**: A specified number of unduplicated RSVP volunteers must be placed in work plans that result in outcomes. This number will be outlined in the grant application materials.

The grant application instructions reflect the Performance Measures Requirements established for the RSVP program by CNCS. The RSVP measures are comprised of Agency-Wide Priority Measures, Complementary Program Measures, or Other Community Priorities.
As volunteer stations are created and new volunteers are enrolled, it is important to keep in mind the community needs specific to the primary focus area and to create volunteer activities that align with outcomes and volunteer activities within the performance measures.
Module 3: RSVP Volunteer and Station Management

Volunteer Stations
Volunteer Stations

A volunteer station is a public agency, secular or faith-based private non-profit organization, or proprietary health care organization that accepts the responsibility for assignment and supervision of RSVP Volunteers. Each volunteer station must be licensed or otherwise certified, when required, by the appropriate state or local government. Informal groups do not qualify as volunteer stations.

45 CFR 2553.12(r)

A wide variety of community organizations are eligible to be volunteer stations. Stations should be selected that support the performance measurements agreed upon in the project’s grant application. Work with the station to be sure they can help support your volunteer service activities and data collection plans that will lead to reaching your outputs and outcomes.
Volunteer Station Memorandum of Understanding (MOU)

The Memorandum of Understanding, which must be negotiated prior to placing volunteers, describes program requirements, working relationships, and mutual responsibilities. It includes general conditions applicable to all projects and volunteer stations and special conditions applicable to the local volunteer station. The basic requirements for the Memorandum of Understanding are found in the regulations at 45 CFR 2553.23(c)(2).

Prior to signing an MOU project director should discuss the responsibilities of volunteer stations with the station’s volunteer supervisor, and with the station administrator who signs the MOU. 45CFR 2553.23(c)(2) of the regulations, outline responsibilities that should be discussed with volunteer stations, and included in the signed MOU.

Links to examples of an MOU can be found in the syllabus.
Proprietary Health Care Facilities

Proprietary Health Care Facilities are health care facilities, including hospitals, nursing homes, or other care centers, that are privately owned and operated for profit. Like all volunteer stations, proprietary health care facilities should:

- Accept the responsibility for assignment and supervision of volunteers
- Limit volunteer assignments to those which provide direct and traditional assistance to patients, such as visiting, teaching, counseling, etc.
- Be included in your approved work plans
- Not displace paid employees and must avoid other staff or clerical assignments

Proprietary Health Care Facilities may be RSVP Volunteer Stations if the decision is supported by community needs and the roles are appropriate for RSVP volunteers.
RSVP Project Sponsor Serving as an RSVP Station

The RSVP project itself may function as a volunteer station or initiate special volunteer activities provided the Corporation agrees that these activities are in accord with program objectives and will not hinder overall project operations.

45 CFR 2553.61

The sponsor may function as a volunteer station, but no more than 5% of the total number of volunteers budgeted for the project may be assigned to the sponsor in administrative or support positions. This limitation does not apply to the assignment of volunteers to other service programs administered by the sponsor or to special volunteer activities of the project.

45 CFR 2553.61

Project operation can be strengthened by assignment of RSVP or non-RSVP volunteers to responsible roles under direction and control of the RSVP director. Projects cannot include the time of RSVP volunteers in the grant budget as part of the local support, as they can with other non-RSVP community volunteers who satisfy guidelines for project in-kind contributions.
Responsibilities of Volunteer Stations

- Volunteer Assignment Descriptions
- Volunteer Training and Orientation
- Supervision of Volunteers
- Provide for Volunteer Safety
- Recordkeeping

• Volunteer Assignment plans: Volunteer stations provide a written outline of duties or description of individual assignments. These should be on file in the RSVP office or at the volunteer station and a copy should be given to each volunteer when assigned. Written assignments help to identify and clarify what the volunteer is expected to do and help to avoid misunderstanding.

• Training and Orientation: Station must play a role in the on-site orientation for the volunteer and in ensuring that they have the training needed for them to perform their roles.

• Supervision: The supervisor must be identified on the MOU and their roles spelled out. The supervisor is key in developing the assignment plans and in evaluating the annual performance of the volunteer.

• Safety: Volunteers should not be placed in a role or assignment that infringes on the well-being of the volunteer or places them in danger.

• Recordkeeping: Stations should be in agreement to provide data you will need to complete required reports.
Responsibilities of RSVP Sponsor

The RSVP Sponsor should work with the Volunteer Station to:

- Inform volunteer stations of prohibited activities
- Provide volunteer leadership opportunities
- Evaluate volunteers and stations
- Provide training on program policies
- Develop appropriate orientation and training for each volunteer
The next three slides list common compliance findings and common questions regarding Volunteer Stations.

- It is important that there is a current MOU (signed within the past 3 years) that meet the requirements for volunteer stations.
- The Senior Corps Regulations and the Compliance Monitoring Guide lists the policy requirements regarding non-discrimination. Check the NPDO syllabus for a sample MOU that illustrates how these requirements may be included in the stations agreement.
- A common finding is that individual or groups of RSVP volunteers are enrolled but are not assigned to a RSVP volunteer station. All RSVP volunteers must be assigned to a volunteer station.

Projects should verify that each volunteer station is a public agency, a non-profit organization, or proprietary health care organization. There should be a statement declaring the station’s organization type in the signed Memorandum of Understanding (MOU). Well known public agencies, such as public schools, can be verified by the signed statement in the MOU. In the case of non-profit organizations and proprietary health care organizations the project director should verify status. An organization's tax-exempt status can be verified by asking to see their IRS letter recognizing it as tax-exempt. You may also confirm an organization's non-profit status by contacting the IRS. Other documentation may also be acceptable.
Volunteer Assignments
RSVP Volunteer Assignment Description

Volunteer stations should provide written outline of duties or description of individual assignments.

Written assignments help to identify and clarify what the volunteer is expected to do and help to avoid misunderstanding.

Each volunteer should receive a copy of the volunteer assignment description when assigned to a position.

During a compliance monitoring review the CNCS program officer will ask to see the volunteer assignment description for each volunteer. Volunteers should be given a copy of their volunteer assignment description.
Volunteer Assignments
RSVP Project Volunteer Assignments should:

- Meet community needs
- Match volunteer’s skill-set and interests with community needs
- Expand service in areas of need
- Be in compliance with regulations
- Complement and supplement current site activities
- Promote volunteer leadership
- Support approved work plans

In the NPDO Syllabus there are samples of Volunteer Assignment Descriptions.
Volunteer Activities
Inappropriate volunteer activities may include:

- Street traffic control
- Participating in “ride along” with on-duty officers
- Riding on emergency equipment when on call
- Performing emergency duties assigned to fire or police employees
- Serving as paramedics, emergency medical technicians (EMT) or other in other emergency medical service roles
- Any roll that would otherwise be performed by an employed worker

RSVP volunteers should not be given any assignment that places the volunteer at risk of personal harm. Also, consistent with 45 CFR 2553.91, volunteers “shall not perform any service or duty or engage in any activity which would otherwise be performed by an employed worker or which would supplant the hiring of or result in the displacement of employed workers, or impair existing contracts for service.”
Volunteer Assignment: Common Compliance Findings

- RSVP Volunteers assigned to inappropriate activities
- Volunteer assignment descriptions are not current or not on file
- No documentation that the volunteer received an assignment description

Volunteer Station or Volunteer Files for assignment descriptions and verifications that volunteer received assignment.
RSVP Volunteer Eligibility to be Enrolled

RSVP volunteers must be 55 years of age or older, willing to serve on a regular basis without compensation, and reside in or nearby the community served by RSVP. They must also be willing to accept instruction and supervision as required.

45 CFR 2553.41(a)

Eligibility to be an RSVP volunteer may not be restricted on the basis of race; color; national origin, including limited English proficiency; sex; age; religion; or political affiliation; or on the basis of disability, if the volunteer with a disability is qualified to serve.

45 CFR 2553.41(b)

Volunteer enrollment documentation should include:
- Documentation that the volunteer is age 55 or older.
- Enrollment form signed and dated by the volunteer and RSVP staff
- Signed Designation of Beneficiary
- Verification that the volunteer received Position/Assignment Description

Check your grant application to review your agency's plan for recruiting a diverse corps of volunteers.

See the NPDO Syllabus for a sample Volunteer Enrollment form.
Orientation and Training Responsibilities and Goals

- Introduce the RSVP volunteers to RSVP, the sponsor, and CNCS
- Provide information on project policies, time sheets, appeal procedures, insurance, and other administrative details
- Verify that volunteer has received Volunteer Handbook (or other documents) that outline the RSVP policies, procedures, benefits, grievance policy, etc
- Acquaint volunteers with project, volunteer station, and sponsor staff, and other RSVP volunteers
- Give RSVP volunteers the opportunity to visit and become acquainted with their volunteer stations

It is important for volunteers to receive the orientation and training they need to successfully complete their assignments and to comply with RSVP program rules. Review the recruitment and retention section in your grant to be sure you are following the training plan that was approved for your project.

See syllabus for orientation ideas and documents.
Volunteer Benefits: Cost Reimbursements

RSVP volunteers are provided with cost reimbursements and other benefits. Within the limits of a project’s approved budget, and in accordance with 45 CFR 2553.43 and written Senior Corps policy guidance to projects, volunteers may be provided transportation, meals, in addition to accident and liability insurance, and recognition activities.

- Sponsors should establish written cost reimbursement policies and procedures and share with each volunteer when they enroll.
- “Volunteer Expenses” is a limited category which includes these volunteer costs:
  - Transportation
  - Meals
  - Insurance
  - Recognition Items and Activities

• Transportation: to and from assignment, official project activities including orientation, training, Advisory Council and recognition event. Projects should establish cost effective policy that may include bus fare, mileage, vans, etc. Projects my limited the transportation benefit but it must be in written policy that is shared with the volunteer. Timesheets should verify that volunteer was serving on day the transportation costs was incurred. When the project covers volunteer transportation cost the timesheet must be signed by the volunteer, station supervisor and RSVP staff.

• Meals: Within the limits of the project’s approved budget and project policy, RSVP volunteers receive assistance with the cost of meals while on assignment. [45 CFR 2553.43] Funds for this volunteer benefit may be limited, but it should be provided when possible.

• Insurance: The program regulations require RSVP volunteers to be provided with accident, personal liability, and, when appropriate, excess automobile liability insurance. [45 CFR 2553.43]

• Recognition: Appropriate recognition for service is to be provided for RSVP volunteers. [45 CFR 2553.43]

• Documenting volunteer reimbursements will be discussed in Module 4.
Volunteer Recognition

At least annually the project sponsor plans and安排s for formal public recognition of Senior Corps volunteers for their service to the community. Sponsors are also authorized to recognize local individuals and agencies or organizations for significant activities that support project goals.

Examples of recognition events include:

- Special ceremonies
- Breakfasts or luncheons
- Recreational outings

• Informal recognition ought to be ongoing, such as listening to and acting upon recommendations by RSVP volunteers, offering honest praise, and providing assignments that are increasingly satisfying.

• Recognition events may consist of special ceremonies, teas, breakfasts, luncheons, and recreational outings at which pins and certificates for stipulated terms of service are awarded.

• The RSVP Community Advisory Group and volunteer stations are expected to participate in recognition activities. Community contributions in support of recognition activities can enhance the quality of the events. Contributions need not be monetary. Donated space, food, decorations, and transportation should be encouraged.

• To emphasize the importance of the occasion, CNCS staff, as well as city and county officials and officers of local organizations may be invited to recognition events.

• The Corporation does not supply volunteer recognition materials nor does it require specific recognition materials.
Volunteer Retention

RSVP retention is key to achieving performance measures. Senior Corps sponsors must ensure the project has a plan and infrastructure to:

- Create high quality volunteer assignments with opportunities such as sharing their experiences, abilities, and skills to improve their communities and themselves through service in their communities
- Ensure RSVP volunteers receive training needed to be highly effective in addressing identified community need(s)
- Recognize RSVP volunteers’ accomplishments

One way to address volunteer retention is to periodically assess the quality of the RSVP program through surveys, questionnaires and ongoing training for volunteers. Utilizing information from volunteers and the community to inform your program can assist in building a strong program and increase volunteer retention.
Graduating Volunteers and Separation from Service

RSVP Sponsors are required to have appropriate policies on service termination as well as procedures for appeal from such adverse action.

Sponsors are encouraged to work with their Community Advisory Group in establishing policies covering volunteer separation and appeals. An RSVP sponsor may separate an RSVP volunteer for cause, including, but not limited to, extensive or unauthorized absences, misconduct, and inability to perform assignments or accept supervision, in accordance with the sponsor’s policies. Appeals for adverse actions are also subject to the sponsor’s policies.

45 CFR 2553.52

Policies covering volunteer separation and appeals should include:

- What reasons could cause separation? (examples: Unauthorized absences, misconduct, inability to perform assignment)
- Can the volunteer be reassignment?
- What is the procedure?

Volunteers who do not serve on a regular basis or intensively on short-term assignments, such as at special events or projects, become classified as inactive. Only active volunteers should be included in reporting of volunteer data to the Corporation.

Occasionally RSVP projects may find it necessary to responsibly graduate volunteer stations to meet changing community needs. Effort should be made to minimize disruptions to current volunteers where possible. In some cases it may be possible to reassign volunteers to a priority area or a capacity building service activity rather than close a station completely.
RSVP Volunteers: Common Compliance Findings

- No written policies on adverse action or graduating volunteers
- Inadequate system for required tracking and reporting of volunteers
- Annual Assessment of volunteer safety
- Volunteer age is not verified on documentation

When conducting compliance monitoring reviews CNCS staff check the following documentation relevant to these common findings:

- Written policy regarding adverse action, separation from service or graduating volunteers
- Written project or sponsor policy regarding tracking and reporting volunteer data
- Documentation of annual assessment of volunteer safety from stations
- Documentation that sponsor has verified age of volunteer. It is not necessary to keep Personally Identifiable Information (PII) on file. A signature that the RSVP director or other designated sponsor staff has viewed documentation and verified age is sufficient.
Community Partners and Collaboration
Community Partners and Collaborations

Senior Corps programs should partner with other national service programs and other community organizations in order to:

- Assess and respond to the needs in the community/service area utilizing RSVP volunteers
- Build public awareness of and support for the program within the community
- Enhance the capacity of organizations and institutions within the community
- Work to integrate senior service into the activities of other service programs within the community
- Work toward common goals in local communities, complementing and reinforcing each other’s contributions through activities related to Days of Service, Strategic Initiatives, and other local service initiatives

RSVP projects should seek out partnerships with other National Service projects, and community partners, to coordinate common volunteer activities and share resources when all are working to alleviate the same community needs. Volunteers, volunteer stations, advisory councils, and community partners are key partners in the success of an RSVP project.

Check with your CNCS Program Officer to find other National Service programs in your area.
Senior Corps Week is a week-long initiative designed to create awareness and to recognize and thank volunteers for the impact they make in their communities. Marketing Strategy includes radio and TV PSAs, Satellite/Radio media tour to run during Senior Week (featuring celebrity spokesperson), advertising on bus/metro, window sticker for distribution to programs.

For Senior Corps Week projects are encouraged to:
- Outreach to local radio and television stations to encourage PSA air time
- Work with other national service programs to recognize senior service
- Have local and state proclamations issued
- Host recognition events
- Encourage community partners to recognize senior service
- Share your activities with your CNCS State Office.
Module 3: RSVP Volunteer and Station Management

Summary
Module 3 Summary

Now that you have completed Module 3, you should:

- Have a better understanding of what should be in your written policies and procedures and forms concerning station and volunteer management.
- Check to be sure all of your MOUs are current.
- Review current MOU, assignment descriptions, enrollment forms, and cost reimbursement policies used by your program.
- Confirm your project has appropriate policies in place for volunteer terms of service and service separation.
- Review the narratives in your approved grant application and used them as a guide for working with stations and volunteers to reach your performance measure and to recruit and retain volunteers.

If you have not completed the first Preparation Assignment, please take some time to complete it. Once you have completed the Preparation Assignment and Presentation 3 you are ready to conclude the 3rd Module by consulting with your program officer regarding any question you may have about the information covered in Module 3.
Preparation for Module 4: Budget, Reports and Fiscal Management

Prior to Presentation 4 please complete the following Preparation Activities:

- Review the Budget Narrative of your current grant.
- Refer to Module 4 Preparation Activities in the New Project Directors’ Orientation Syllabus for the complete list of activities.

Please complete the Preparation Activities listed in the NPDO Syllabus for Module 4 before you view Module 4.
Congratulations! You've successfully completed Module 3 Presentation of the New Project Director’s Orientation! Thank you for your participation.