

LETTER OF INTENT TO APPLY FOR CONTRACT

Under Title III of the Older Americans Act
Fiscal Year July 1, 2025 through June 30, 2026

Summary Sheet

Applicant Agency: Rocky Tri-County RSVP Project Director: Samara Lynde
Mailing Address: PO Box 1717 Street Address: 200 S Cruse Ave
City, State, Zip: Helena, MT 59624 City, State, Zip: Helena, MT 59601
E-Mail: slynde@rmdc.net E-Mail: slynde@rmdc.net

Type of Organization:

☐ City ☐ County ☒ Private Non-Profit ☐ Other (specify): _____

Geographic area to be served: Lewis & Clark, Broadwater, and Jefferson counties

List services to be provided:

Estimated # of unduplicated *persons*
to be served during project period for
each service type:

Estimated # of unduplicated *units* of
service during project period for each
listed service type:

<u>nutrition services</u>	<u>600</u>	<u>50 volunteers/5000 hrs</u>
<u>transportation services</u>	<u>50</u>	<u>12 volunteers/1200 hrs</u>
<u>support services</u>	<u>150</u>	<u>30 volunteers/3000 hrs</u>

Applicant agrees that the project described in this Letter of Intent will be operational July 1, 2025 through June 30, 2026 and certifies that to the best of my knowledge and belief, the information in this application is true and correct and the attached conditions will be complied with if the contract is awarded.

Lori Ladas

Type or print person authorized to sign

Executive Director

Title

Samara Lynde

Type or print person authorized to sign

RSVP Program Director

Title

Lori Ladas
Signature

3/24/25
Date

Sam Lynde
Signature

3-24-25
Date

LETTER OF INTENT TO APPLY FOR PROJECT GRANT
Under Title III of the Older Americans Act
Fiscal Year July 1, 2025 through June 30, 2026

Project Description Sheet

(Please fill out a *Project Description Sheet* for each service provided.
Attach additional pages if necessary to complete the following questions.)

1. **Service or Project name:** Rocky Tri-County Retired & Senior Volunteer Program (RSVP)

2. **Provide a description of how your program will spend the Title III funding.**

Funding awarded to Rocky's Tri-County RSVP will be used to supplement the existing program budget. It will help cover the day-to-day cost of running the program, help upgrade training materials, and provide health and wellness materials for volunteers and clients. Through this funding, our volunteers will be able to continue to provide seniors (age 60 and older) with nutrition, transportation, and health services, allowing them to live independently, with dignity, and to age in place.

RSVP has a workforce of 80+ volunteers, age 55 and older, who serve at various non-profit sites throughout a three county area. These volunteers work at sites that are specifically dedicated to serving clients that fall under the guidelines of the Older Americans Act: "Seniors over 60 with the greatest economic or social need, with particular attention to low-income and low-income minority, residents in rural areas and the disabled or frail". These dedicated volunteers donate their time and effort, over 7,000 hours annually, to both fixed and floating sites (Stations) that aid the senior population in remaining as independent and productive as possible in their own homes and communities.

3. **Statement of how your project will coordinate services with other community programs.
(Include a description of referral systems.)**

Tri-County RSVP has a partnership and Memorandum of Understanding in place with six non-profit stations that align with the mission of the Older Americans Act. These partners are Helena Senior Center, Rocky Meals on Wheels, Rocky RSVP Go-Getters, Helena Women's Club, Augusta Food Share, and Helena Food Share. RSVP provides volunteers to these stations to assist seniors by collecting, stocking, and dispersing food and personal care products, providing wellness classes, companionship opportunities, and transportation to medical appointments.

Our sponsor, Rocky, strives to serve senior citizens as well as low-income families and individuals. Rocky has responsibly facilitated the use of millions of dollars in federal grants to be a leader in assisting the needs in our communities and improving the lives of those in them.

Community involvement, at all levels, is of the utmost importance to Rocky. RSVP's Helena Senior Center Services program has a multitude of activities located at the Helena Neighborhood Center and the Eagles Manor sites. We offer a variety of exercise classes that are popular with our clients such as, line dancing, managing arthritis exercises, and Chi Gong. Another popular wellness program we offer is the Be Well Clinic. This clinic offers weekly monitoring of health issues that are important to seniors including blood pressure testing, oxygenation rate, and education materials.

RSVP partners with Meals on Wheels (MOW), Augusta Food Share, and Helena Food Share to help seniors with nutrition and food insecurity. Our MOW volunteers use their own vehicles to pick up and deliver fresh meals to homebound seniors. This not only provides them with a nutritious meal, but also provides a friendly "hello" and safety check to those who may be socially isolated.

The Augusta and Helena Food Share sites provide emergency food for all who need it. RSVP volunteers help stock, box up, and distribute the food donations. We also available to help them with special projects that include reminder phone calls for senior commodity pick up, food donations at the Symphony Under the Stars, and distributing Thanksgiving dinner kits.

Rocky RSVP serves as a station for the Rocky Go-Getters Program. This program offers companionship and medical transportation to seniors. The volunteers provide friendly visitation weekly to housebound seniors and/or rides to medical appointments.

RSVP also partners with the Helena Women's Club to provide personal care items to low-income seniors. Volunteers gather, pack, and distribute personal care items quarterly to low-income seniors.

Referrals to the programs served by our volunteers, as well as to our program itself, come from resource specialists in the Rocky Agency on Aging program, the State Agency Referral System, montana211.org, volunteerhelena.org, Rocky's Facebook page, and United Way's weekly spot in our local newspaper. The activity generated from these referral sources enables us to direct our volunteers to any qualified non-profit, agency, or non-proprietary healthcare facility and assist them as needed. All RSVP sites qualify by meeting the mission criteria of benefiting senior, disabled, low-income, or disadvantaged persons.

4. Statement of how your project will fulfill the mission of the Older Americans Act. (Include a description of criteria for selection of clients, outreach and targeting activities and how the project fulfills the objectives of the OlderAmericans Act.)

RSVP will fulfill the mission of the Older Americans Act by providing volunteers to partners that assist older persons in leading independent, meaningful, and dignified lives in their own homes and communities for as long as possible. Volunteers will support these partners by providing administrative, technical, and hands-on donated labor. RSVP volunteers are out in our community performing needed jobs for these entities that fulfill essential services for seniors and the income-challenged.

Each of our partner organizations has their own screening mechanisms for determining age criteria, economic evaluation, geographic residency, and qualifying status for their clients. We do not duplicate these requirements, but ask them to provide demographic information on their services for our reporting purposes. Another bonus facet of the RSVP program is that our volunteers are seniors themselves. One must be over 55 years of age to serve in AmeriCorps Seniors RSVP. Currently, over half of our 96 volunteers are over the age of 70. The average age of our volunteers is 74. The program must meet their expectation for meaningful volunteer experiences that allow them to share their abilities and skills to improve the community and themselves. To maintain this pool of skilled volunteers, RSVP has a training curriculum specific to the job type, taught by RSVP and station staff, which educate them in the appropriate areas of their pending volunteer work. We also listen to their ideas of potential service areas and create new volunteer jobs to pursue their passion and fulfill needed services in our community.

Each potential RSVP volunteer goes through a screening process to validate their eligibility, which includes proof of age and a name search on the U.S. Department of Justice National Sex Offender Public Website database. The Go-Getter volunteers complete an FBI background check as well. If accepted, volunteers share their needs and desires for job placement. Their new job duties are clearly defined, written, and kept at the station and the RSVP administrative office. They are also given a Volunteer Handbook that explains the program rules and regulations. Recruitment for volunteers is accomplished through advertisement in Rocky's newsletters and website, volunteerhelena.org, Facebook, flyers and brochures placed around the community, and word of mouth. Our volunteers are the best recruiters!

5. If extra funding was available, what would you do to increase services and how would you plan to spend the money?

The availability of additional funding through this grant would allow RSVP the ability to increase travel to out of town sites, which would add to the support of the site and its volunteers. This would also help to recruit needed volunteers for those sites. Extra funds would allow RSVP to increase volunteer retention and satisfaction by providing funds for recognition events. Additional funding would bring opportunities for further training for the staff and volunteers through conferences and paid webinars. All of these items would help empower the volunteers and staff and support the goals of the Older Americans Act.

The Older Americans Act requirements state that aging providers are supposed to "target resources from all appropriate sources to meet the needs of older persons with the greatest economic or social need, with particular attention to low income, low income minority, those residing in rural areas, and elders who are disabled and frail. Providers are also required to ensure access to service based on certain economic, demographic and geographic factors."

6. Please provide letters of support from other local community-based and/or institutional programs, agencies or organizations involved with older adults.
7. List wage range of all employees funded in full or in part by this contract: \$ 25.53 to \$ 26.42.
8. Is this project covered by liability insurance? yes How much? see attachment
8. How many years has this project received Title III funds: 8 years
10. Please provide a **detailed** estimated budget for this Title III service for the fiscal year 2025-2026 as follows (list appropriate estimated resources):

PLEASE FILL IN THE FORM BELOW, YOU MAY SUBMIT ADDITIONAL SUPPORTING DOCUMENTATION IF NECESSARY.
(Your expenses should equal your resources)

Expenses:

Personnel and fringe:	<u>76,052.00</u>
Supplies:	<u>300.00</u>
Raw food/meals:	<u>0.00</u>
Commodities:	<u>0.00</u>
Communications:	<u>2183.00</u>
Utilities:	<u>0.00</u>
Repairs/maintenance:	<u>0.00</u>
Travel/training:	<u>5013.00</u>
Building space:	<u>2717.00</u>
Insurance:	<u>1000.00</u>
Equipment:	<u>0.00</u>
Contracted services:	<u>0.00</u>
Audit:	<u>225.00</u>
Other:	<u>14,674.00</u>
TOTAL:	\$ <u>102,164.00</u>

Resources:

Area IV Funds:	<u>7500.00</u>
Project income:	<u>0.00</u>
Other Resources:	<u>50,000.00 (Federal Grant)</u>
Cash in Lieu:	<u>0.00</u>
Commodities:	<u>0.00</u>
Match:	<u>44,364.00</u>
Other:	<u>300.00 (donations)</u>
Other:	<u>0.00</u>
TOTAL:	\$ <u>102,164</u>

Application deadline - The electronic application and 2 copies must be received by Rocky before 4 p.m. Friday, March 28, 2025. Applications received after this deadline date will not be considered for funding.

The contractor presentations will be on Zoom again this year.

The date of the Area IV Board Meeting is May 15, 2025 at 9:00am.



ROCKMOU102

SOLIVER

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

11/20/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Helena Office Marsh McLennan Agency LLC P.O. Box 6127 Helena, MT 59604	CONTACT NAME: Kathy Burt		
	PHONE (A/C, No, Ext): (406) 457-2103	FAX (A/C, No):	
	E-MAIL ADDRESS: Kathy.Burt@MarshMMA.com		
INSURED Rocky Mountain Development Council, Inc P.O. Box 1717 Helena, MT 59624	INSURER(S) AFFORDING COVERAGE		NAIC #
	INSURER A: Cincinnati Insurance Company		10677
	INSURER B: Montana State Fund		15819
	INSURER C:		
	INSURER D:		
	INSURER E:		
	INSURER F:		

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			ETD 0589078	9/6/2024	9/6/2025	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 3,000,000 PRODUCTS - COMP/OP AGG \$ 3,000,000
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY			ETD 0589078	9/6/2024	9/6/2025	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$			ETD 0589078	9/6/2024	9/6/2025	EACH OCCURRENCE \$ 3,000,000 AGGREGATE \$ 3,000,000
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y/N If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	033995291	10/1/2024	10/1/2025	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 500,000 E.L. DISEASE - EA EMPLOYEE \$ 500,000 E.L. DISEASE - POLICY LIMIT \$ 500,000
A	Professional			ETD 0589078	9/6/2024	9/6/2025	Each Claim 1,000,000
A	Liability			ETD 0589078	9/6/2024	9/6/2025	Aggregate 3,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

CANCELLATION

Rocky Mountain Development Council, Inc
P.O. Box 1717
Helena, MT 59624

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Rocky Mountain Development Council, Inc. (Rocky)

Board of Directors

Public Sector Representatives

These terms expire at the discretion of the organization appointing them.

Cory Kirsch
Jefferson County Commission
PO Box H
Boulder, MT 59632
406-225-4028
ckirsch@jeffersoncounty-mt.gov

Jesse Swenson
Broadwater County Commission
515 Broadway St.
Townsend, MT 59644
406-980-1213
jswenson@broadwatercountymt.gov

Dannai Clayborn
City of Helena
316 N. Park Avenue Room 322
Helena, MT 59623
406-447-8409
dmclayborn@helenamt.gov

Andy Hunthausen
Vice President, Rocky, Inc.
Lewis & Clark County Commission
City County Building
316 N. Park Ave, Rm 345
Helena, MT 59623
406-447-8304
ahunthausen@lccountymt.gov

Dan Rispens
East Helena Public Schools
11 Cloverview Drive
Helena, MT 59601
406-439-0630
drispens@ehps.k12.mt.us

Low-Income Sector Representatives

Kate Anderson*
Prickly Pear Cooperative
3960A St. Mary's Road
East Helena, MT 59635
406-417-1042
kathrineannanderson@gmail.com
Term expires: 2027

Susan Geise
Secretary/Treasurer, Rocky, Inc.
Habitat for Humanity
PO Box 12; 209 Fleming
Augusta, MT 59410
406-396-4645
msusangood@montana.com
Term expires: 2025

Teri Lilletvedt
Pureview Health Center
1930 9th Ave.
Helena, MT 59601
406-500-2043 (work)
406-459-3946 (cell)
Teri.lilletvedt@pureviewhealthcenter.org
Term expires: 2026

Erin Lyndes**
Jackson, Murdo & Grant, P.C.
1033 Butte Avenue
Helena, MT 59601
406-461-4903
elyndes@jmgattorneys.com
Term expires: 2026

Lana Larson
Head Start Policy Council
2970 Spokane Creek Rd
East Helena, MT 59635
708-305-1650
lanabjornson@gmail.com
Term expires annually

Private Sector Representatives

Trever Kirkland
President, Rocky, Inc.
First Interstate Bank
P.O. Box 6013
Helena, MT 59604-6013
406-422-1633 - Work
406-439-3769 - Cell
trever.kirkland@fib.com
Term expires: 2026

Debbie Havens
1325 Clover Rd
Helena, MT 59601
406-431-4016
debdhavens@yahoo.com
Term expires: 2027

Paula Jacques+
PO Box 141
Clancy, MT 59634
406-431-7485
pjpcmm@gmail.com
Term expires: 2027

Bruce Day
1747 Karmen Road
Helena, MT 59602
406-439-7850
day406@gmail.com
Term expires: 2026

Charlie Lane
522 Tamarack St.
Helena, MT 59601
406-431-1241
charleslanemt@gmail.com
Term expires: 2027

Revised February 2025

*Member who has a background and expertise in early childhood education and development.

** Member who is a licensed attorney familiar with issues that come before the governing body.

+ Member who has a background and expertise in fiscal management or accounting.

March 11, 2025

Linda Pfister
5 Kevin Ct
Helena, MT 59601

Dear Area IV Agency on Aging Board,

My husband and I have been volunteers with Rocky's RSVP program for four years. We started out delivering Meals on Wheels and for the past two years, we have been a part of the Rocky Go-Getters, a medical appointment transportation program for older adults. This program is one of the most gratifying volunteer opportunities that I have ever been associated with.

Previously, I had not realized the lack of availability for transportation in Helena. Our clients usually have a disability of some kind—occurring from a fall, surgery, vision impairment, stroke, etc. Not being able to drive also gives them a heartbreaking sense of isolation. Having a volunteer pick them up at their door (free of charge), give them a helpful hand, and deliver them back home after their appointment is priceless.

This service offered through Rocky RSVP fills a large need in our community. My experience with Rocky RSVP has been wonderful and I would be grateful for your consideration of their grant proposal to help continue this vital work.

Sincerely,

A handwritten signature in cursive script that reads "Linda Pfister". The ink is dark and the signature is fluid, with the first and last names being more prominent than the middle name.

Linda Pfister

March 14, 2025

Dear Area IV Agency on Aging Board Members,

Rocky's Meals on Wheels Program is pleased to give our full support once again for the Retired & Senior Volunteer Program (RSVP) application for project funding from the Area IV Agency on Aging. I understand this funding will allow RSVP to continue to address the needs of those with economic and social need, low-income minorities, individuals residing in rural areas, and seniors.

Last year, Rocky helped over 835 seniors in Lewis and Clark, Broadwater, and Jefferson counties live as independently as they are able through the Meals on Wheels program. Hot, nutritious meals are delivered Monday through Friday to seniors 60 and over who are homebound or having trouble preparing their own meals due to a disabling physical, emotional, or environmental condition. Currently there are ten volunteer-led routes delivering over 200 daily meals in the Helena area, including frozen meals for weekends and holidays. This past year, Meals on Wheels utilized 49 RSVP volunteers who donated 6,976 hours to the program.

Meals on Wheels truly is "more than a meal," as these volunteers also provide daily check-ins and social contact with many homebound seniors. The profound impact RSVP volunteers have on Meals on Wheels clients cannot be stressed enough. RSVP volunteers are truly amazing individuals who make a huge difference in the lives of the people they serve.

I am also grateful for my collaboration with RSVP Director, Samara Lynde. From the first meeting during volunteer orientation through our Meals on Wheels volunteer recognition events, Samara is an enthusiastic supporter. I believe that volunteer retention and overall positivity come from being shown appreciation and being offered meaningful work. Samara and I are a good team and make supporting and recognizing our volunteers a priority, which has resulted in a great retention rate.

It is my pleasure to offer support for Rocky RSVP's grant application. We could not meet the needs of our clients without our RSVP volunteers. We value our continued strong relationship with RSVP and hope to continue this great partnership for many years to come!

Sincerely,

A handwritten signature in dark ink, appearing to be 'TH' followed by a long, sweeping horizontal line.

Tamara Hutchinson
Senior Nutrition Volunteer Coordinator
Meals on Wheels
Rocky Mountain Development Council
406-594-4261



March 17, 2025

To Whom It May Concern,

I am writing to express Helena Food Share's strong support for the continued funding of the Retired Senior and Volunteer Program (RSVP) under the Rocky Mountain Development Council. Helena Food Share is a community-based nonprofit organization dedicated to providing food to those in need in a respectful and dignified manner. We collaborate with other organizations to eliminate hunger in the greater Helena area. Volunteers are essential to our daily operations.

Over the past year, we have had the privilege of working closely with ten dedicated RSVP volunteers who made significant contributions to the success of our grocery rescue program. Additionally, we have utilized RSVP special project volunteers throughout the year to contact our senior customers, ensuring they receive the proper nutrition necessary to maintain their health as they age. In total, these volunteers donated an impressive 830 hours of service, helping us provide vulnerable members of our community with access to nutritious food.

RSVP's approach to assisting those in need is truly unique. They partner with multiple nonprofits, state agencies, faith-based organizations, and proprietary healthcare providers. This collaboration allows RSVP to deploy senior volunteers where they are most needed, benefiting other retired seniors, veterans, and homebound individuals. For these reasons, RSVP is an ideal candidate for receiving grant funding.

It is our honor to offer our support for the Rocky RSVP Program's grant application. Our confidence is based on our long-standing relationship with RSVP, the quality of volunteers they have provided to our organization, and their continued partnership in other programs.

Sincerely,

Jordan Evertz
Executive Director
Helena Food Share