

LETTER OF INTENT TO APPLY FOR CONTRACT

Under Title III of the Older Americans Act
Fiscal Year July 1, 2026 through June 30, 2027

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, Jefferson, and Broadwater Counties

List services to be provided:	Estimated # of unduplicated <i>persons</i> to be served during project period for each service type:	Estimated # of unduplicated <i>units</i> of service during project period for each listed service type:
<u>Nutrition Services</u>	<u>600</u>	<u>50 volunteers/5000 hrs</u>
<u>Support Services</u>	<u>150</u>	<u>30 volunteers/3000 hrs</u>
<u>Transportation Services</u>	<u>60</u>	<u>15 volunteers/1500 hrs</u>

Applicant agrees that the project described in this Letter of Intent will be operational July 1, 2026 through June 30, 2027 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
3/10/26
Date
Samara Lynde
Signature
3-10-26
Date

LETTER OF INTENT TO APPLY FOR PROJECT GRANT
Under Title III of the Older Americans Act
Fiscal Year July 1, 2026 through June 30, 2027

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 90+ 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 10,000 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 five 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, Augusta Food Share, and Helena Food Share. RSVP provides volunteers to these stations to assist seniors by collecting, stocking, and dispersing food, 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 offers many 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. This includes assisting in the distribution of senior commodities.

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.

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, montana211.org, volunteerhelena.org, Rocky's Facebook page, United Way's weekly spot in our local newspaper, and through our volunteers word-of-mouth sharing. 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 Older Americans 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 101 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. I also hope to be able to purchase ride scheduling software to ease the dispatch portion of the ever-growing medical appointment transportation program. Extra funds would also 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: \$ 30.93/hr to \$ 31.58/hr.
8. Is this project covered by liability insurance? Yes How much? see attached
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 2026-2027 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>\$89,189.00</u>
Supplies:	<u>300.00</u>
Raw food/meals:	<u>0.00</u>
Commodities:	<u>0.00</u>
Communications:	<u>2,748.00</u>
Utilities:	<u>0.00</u>
Repairs/maintenance:	<u>0.00</u>
Travel/training:	<u>4,485.00</u>
Building space:	<u>2,807.00</u>
Insurance:	<u>1,006.00</u>
Equipment:	<u>1,500.00</u>
Contracted services:	<u>0.00</u>
Audit:	<u>300.00</u>
Other:	<u>16,954.00</u>
TOTAL:	\$ <u>119,289.00</u>

Resources:

Area IV Funds:	<u>\$7,500.00</u>
Project income:	<u>0.00</u>
Other Resources:	<u>50,000.00</u>
Cash in Lieu:	<u>0.00</u>
Commodities:	<u>0.00</u>
Match:	<u>61,789.00</u>
Other:	<u>0.00</u>
Other:	<u>0.00</u>
TOTAL:	\$ <u>119,289.00</u>

Application deadline - The electronic application and 2 copies must be received by Rocky before 4 p.m. Friday, March 27, 2026. 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 21, 2026 at 9:00am.

Budget Narrative for Area IV Grant Request

RSVP FY27

Expenditures – Please note all expenditures are projected based upon actual expenditures in prior years and the estimated expenses for FY27.

Personnel and fringe benefits include:

- 1) Wages for Program Director 1 FTE;
- 2) Fringe benefits: FICA at 7.65%; workers' compensation at 1.16%; and unemployment insurance at 1.4%;
- 3) Health and life insurance benefits equal to \$1025/month for a full-time employee;
- 4) Employee Assistance Program at \$45.84 for all employees; and,
- 5) A pension plan contribution of 3% calculated on gross wages paid.

Supplies include projected expenses for minor equipment, office/other supplies.

Communications include projected expense for phone lines, postage, photocopies/printing, and computer network fees.

Travel and trainings costs include rental car, gas, meals & lodging for in-state staff travel for recruiting, volunteer training, and staff training. Also includes budget for attendance of the annual CNCS conference (out-of-state).

Occupancy/Building Space costs consist of rent charges for office and storage space.

Audit fees are prorated among all Rocky programs based upon program expenses and the auditor's time allotted to the programs. Rocky is subject to an annual audit because many of the programs, including the RSVP program, receive federal funding.

Other costs include such items as indirect costs, recruitment, software maintenance, and volunteer support costs. Volunteer support includes volunteer transportation, insurance, meals and recognition expenses.

It is significant to note that Rocky, Inc. has a provisional indirect cost rate of 14% that is negotiated with our cognizant agency, the Department of Public Health and Human Services. The rate is applicable to all Rocky programs and is calculated based upon total program expenses less any exclusions. Indirect cost allocations pay for administrative, human resources, and fiscal departments.

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
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Helena, MT 59623
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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
Habitat for Humanity
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406-396-4645
msusangood@montana.com
Term expires: 2028

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
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Term expires: 2026

Katelyn Buck
Head Start Policy Council
2205 11th Ave, Apt. 1
Helena, MT 59601
406-431-1843
Katelynbuck98@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
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Paula Jacques+
Secretary/Treasurer, Rocky, Inc.
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pjpcmm@gmail.com
Term expires: 2027

Bruce Day
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day406@gmail.com
Term expires: 2026

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

Revised October 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 10, 2026

Sharon & Galen McKibben
400 Monroe Ave
Helena, MT 59601

Dear Area IV Agency on Aging Board,

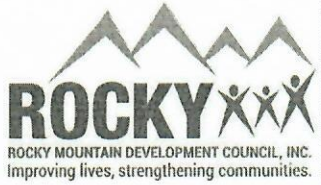
Hello! We are Sharon and Galen McKibben, and we live here in Helena. We are both 88 years old and have AMD (Age-related Macular Degeneration). Therefore, we cannot drive any longer. We learned of Rocky's Retired & Senior Volunteer Go-Getter Program which offers rides for seniors to and from medical appointments and decided to sign-up. In a few words, for us, "Go-Getters is a God send!" This program gives us a sense of security knowing we will be able to make our medical appointments. It makes a big difference to have this type of reliability. The drivers are all dedicated to safety and comfort of those who need rides to medical and related appointments.

This is such a cool and valuable addition to the community. When I first moved to Helena, I was searching for volunteer opportunities and would have done this in a minute. It is such a well-orchestrated program and we know firsthand how invaluable it is.

We are happy to voice our support for any grant funding for this RSVP program. Please help keep this program running and supporting older adults like us in keeping up our health and independence.

Sincerely,

Sharon & Galen McKibben



ROCKY MOUNTAIN DEVELOPMENT COUNCIL, INC.
P.O. Box 1717 | 200 South Cruse Avenue | Helena, MT 59624-1717
phone: 406.447.1680 | toll free: 800.356.6544 | fax: 406.447.1629

March 1, 2026

To the Area IV Agency on Aging Board:

I am the Senior Center Coordinator for the Neighborhood Center in Helena Montana, and I am writing to express my support of Rocky's Retired & Senior Volunteer Program (RSVP).

The RSVP program makes it possible for the Senior Center to offer an array of activities and provide a vibrant and friendly environment for our aging community to come together and make memories. When seniors walk in the door, they are greeted by an RSVP volunteer. Volunteers are there to check folks in, take money for lunch, and direct them to where activities are. Not only are the lunch desk RSVP volunteers amazing support for *my* position as the Senior Center Coordinator, but they are often the first point of contact for our seniors. The first smile, the first "hello", the first "it's good to see you". In many ways our RSVP volunteers are the face of the senior center.

Some other wonderful RSVP faces of our Helena Senior Center make it possible for us to offer: Chair Exercise class, Qi Gong class, Line Dancing, Be Well Clinic, Crafty Quilters, Card Making, and other special events. RSVP volunteers are such an integral part of the Helena Senior Center team, I really can't say enough good things about the program.

I'm continuously impressed by the generous nature of the RSVP volunteers. Not only do these individuals have a drive to serve, I see that doing so contributes to their sense of purpose and creates a space of belonging and camaraderie. Not just for themselves, but for those around them as well.

I strongly support the continued funding of this invaluable program, and I hope you will as well.

Thank you for your time.

Sincerely,

Mary McKitrick

Mary McKitrick
Senior Center Coordinator
Rocky Mountain Development Council Helena Senior Center

March 12, 2026

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 785 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 11 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, as meal sealers who help package the meals for delivery, and delivery drivers.

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. Samara continues to be a strong advocate for Meals on Wheels and the people we serve. 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. Meals on Wheels works to support the independence and well-being of seniors by providing regular nutrition and daily contact with caring providers, and 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,



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