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## Executive Summary

United Way of Dane County will have 20 AmeriCorps members tutor high school students in math in Madison and Middleton, Wisconsin. At the end of the first program year, the AmeriCorps members will have tutored 410 low-performing students, with 230 (75%) of the 307 students who receive at least 15 sessions of tutoring mastering at least 10 assigned math objectives aligned to the Common Core State Standards on individualized progress monitoring assessments and 185 (75%) of the 246 students who receive 20 or more tutoring sessions meeting or exceeding target growth milestones for math on a normed assessment. The AmeriCorps members will leverage an additional 240 volunteers to provide high school math tutoring. This program will focus on the CNCS focus area of Education. The CNCS investment of \$261,667 will be matched with \$480,416 in private funding.

## Rationale and Approach/Program Design

a. PROBLEM/ NEED. Madison and surrounding Dane County, Wisconsin repeatedly rank near the bottom in national studies on the extent of racial and ethnic disparities in life outcomes. Education is one domain in which we need to make significant improvements. The graduation rate for the Madison Metropolitan School District (MMSD) for 2011-2012 was 87% for Whites, 82% for Asians, 63% for Hispanic/Latinos, and 55% for African-Americans; 55% for low-income students (as measured by receipt of free or reduced-price lunch); 56% for students with Limited English Proficiency. These troubling rates are particularly alarming because the MMSD is becoming more diverse: between 1995 and 2012 the percent of children from communities of color rose from 27% to 55%. Of the 25,107 students who enrolled in the Madison schools K-12 in 2012-2013, 11,116 (44%) were White, 4,811 (19%) Latino/Hispanic, 4,676 (19%) African-American/Black, 2,284 (9%) Asian (including a large Hmong population), 2,107 (8%) multi-racial, and 90 (0.4%) Native American. Many of these children of color are from low-income families. The percentage of MMSD students from low-income families rose from 1995 to 2012, from 24% to 47%. Nearly, 75% of all African-American children in Dane County are in poverty. In the adjoining city of Middleton, the graduation rate disparities are also of concern: in 2011-2012 they were 95.5% for Whites, 68% for African-Americans, and 60% for Hispanic/Latinos. Low graduation rates lead to unemployment, underemployment, and low wages (Roderick & Camburn, 1999).

Multiple studies have shown that performance and being "on-track" in the freshman year of high school is highly related to graduation (Allensworth & Easton, 2005; Neild et al, 2008; Roderick & Camburn, 1999). In these studies, being on-track means receiving at least passing grades - ideally

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grades demonstrating proficiency ("C" or better)- in the core subjects of math, English, science and social studies and on-pace credit accumulation. Completing Algebra by the 10th grade is one of the leading indicators that a student will graduate from high school. Students who take higher-level math and science courses requiring strong fundamental skills in mathematics are more likely to attend and complete college (Adelman, 2006; Jonas et al, 2012; Finklestein et al, 2012). Achievement in high school mathematics also is associated with higher future earnings (Rose & Betts, 2001; Carnevale & Desrochers, 2003). Algebra has been identified as a civil rights issue, since access to and completion of algebra is a first step to higher mathematics, college access, and technically skilled jobs (Kaput, 1998; Moses, 1993 and Moses & Cobb, 2001). Studies show that living in a single-parent family, living in poverty, having parents who did not finish high school, and having limited proficiency in English are major predictors of academic struggle (Green & Scott, 1995; Weiss et al, 2009). Green & Scott (1995) have specifically linked these risks to challenges in math. In their study of 14,283 students, 77% of students with two or more risk factors failed to complete a traditional sequence of high school math courses and they were also eight times more likely than their peers to drop out of high school.

In the 2011-12 school year, 1,207 (67%) of MMSD students completed algebra by the end of 9th grade; but there were significant disparities among racial and ethnic groups: 729 (81%) of White students, 125 (77%) of Asian students, 166 (46%) of African-American students, and 116 (46%) of Hispanic/Latino students. That means 595 9th grade students did not complete algebra, 423 (71%) of those students were students of color. Middleton high school, which promotes middle school completion of algebra, has disparities in achievement as well. At the start of the 2012-13 school year, 83% of Middleton 9th graders had completed algebra 1 in middle school, the remaining 17% of students were assigned to algebra 1. A disproportionate number of those students assigned to algebra 1 were students of color: 63% White (versus 82% of the school as a whole), 15% Black (versus 5.4%), 13% Hispanic (versus 5.7%), 4% Asian (versus 7%), 4% two or more races. The average grade for students in algebra 1 was 2.47 (B to C range). Analysis shows worrisome disparities by student race and ethnicity: Asian-2.95, White-2.78, 2 more races-1.95, Hispanic-1.8 and Black-1.75. There was also a grade gap for students in poverty: students who qualify for free/reduced lunch had an average grade of 1.68 and those who do not qualify had an average grade of 2.87.

b. AMERICORPS MEMBERS AS HIGHLY EFFECTIVE MEANS TO SOLVE COMMUNITY PROBLEMS: EVIDENCE-BASE AND MEASURABLE IMPACT. Achievement Connections provides an opportunity for the Corporation for National and Community Service to support an AmeriCorps program in a city with some of the nation's largest racial disparities in educational outcomes, with a

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program that is evidence-based, near scale in reaching its target population of low-income, at-risk high school youth and is highly replicable. (i) THEORY OF CHANGE. The premise of the Achievement Connections program is that AmeriCorps members can use tutoring in math to boost low-performing high school students' basic math skills and math class performance, leading to math credit accumulation and eventually high school graduation. (ii) EVIDENCE-BASE. The design of the Achievement Connections program and its expected outcomes are based on five research findings (stated below in all caps) as well as a pilot of the program as a part of a prior AmeriCorps program. (1) HIGH SCHOOL STUDENTS WHO ARE LOW-PERFORMING IN MATH CAN BENEFIT FROM TUTORING TO SUCCEED IN CLASS.

Studies show that tutoring can successfully increase academic success of under-performing students in math and literacy, with results varying with target population, purpose, program design and quality of implementation (Beal, 2007; Center for Prevention Research and Development, 2009; Cohen et al, 1982; Farr, Brown, & Fontana, 2008; Gordon, 2009; Hock et al, 2001; Lauer et al, 2004). While research is far more extensive on tutoring elementary students in reading, there is a growing body of rigorous research that documents that tutoring in math is particularly effective for middle and high school students. With relatively few programs and studies focused on tutoring secondary students in algebra and geometry, we were required to include some studies that were more than six years old. A meta-analysis by Lauer et al. (2004) of fifty-three studies focused on out-of-school time programs, thirty-three of which had mathematics outcomes, compared participating at-risk students to a control/comparison group and determined (1) academic support programs are beneficial to improving math performance for at-risk youth and (2) such programs are more effective at the high school level than in either elementary or middle school. The study revealed that low-income students participating in supplemental math programming, including one-on-one attention, demonstrated average gains of 6.5 percentile points over similar peers who do not participate in such programming. An evaluation of the MATCH program, in which recent college graduates (including AmeriCorps members) work as full-time tutors with high school students, found that the lowest achieving students had dramatic gains on math examinations after the introduction of one-on-one and small group tutoring (Kraft, 2013). For a student on the edge of proficiency, these gains have the potential to give them true understanding of the material and therefore boost them to proficiency on standardized assessments and earn a course grade of "C" or better. Further, as experts and educational publishers develop supplemental and Response to Intervention programs to build student's core math competencies, there is a growing body of research that demonstrates the effectiveness of technology-

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based math skill-building programs in boosting student math skills (Beal, 2007; Slavin, Lake, & Groff, 2008). For example, in a study of 202 mostly low-performing high school geometry students (one-third each White, African-American and Latino students; 80% receiving free and reduced lunch) receiving on-line math tutoring, Beal (2007) found that on-line tutored students improved on the post-test compared to a control group, with results strongest for students with the weakest initial skills and on the specific skills tutored. The literature also provides evidence that programs without clear goals and structure show little or no student gains (James-Burdumy, et al., 2005; Zimmer, et al., 2007; Ross, et al., 2008). (2) FOR THE TUTORING TO BE EFFECTIVE, IT MUST BE INDIVIDUALIZED, MEANING THE CONTENT AND TUTORING STRATEGIES ARE MATCHED TO THE STUDENT AS INFORMED BOTH BY TEACHER OBSERVATION OF LEARNING STYLES AND COMPREHENSION AND NORMED ASSESSMENTS. Tutoring one-on-one and in small groups has been found to be the most effective tutoring method (Gordon, 2009; Lauer et al., 2004), including studies specifically of algebra tutoring (Hock et al., 2001; Slavin, 1991). Over the past twenty years we have developed a more nuanced understanding that the most effective tutoring programs aren't just one-on-one, they allow for precise individualization. These programs are better than standard homework help tutoring because they focus on skill gaps specific to the student receiving supplemental support (Gordon, 2008). The National Research Council (2001) identified five separate facets of mathematical proficiency: conceptual understanding, procedural fluency, strategic competence, adaptive reasoning, and productive disposition (i.e. the ability to see mathematics as sensible, useful, and worthwhile and a belief in one's own self-efficacy), each of which need to be addressed for a student to fully comprehend mathematical concepts being taught. Too often there is inadequate time in the classroom for students to hone these proficiencies; individualized tutoring can provide that opportunity. In a rigorous study of Algebra tutoring techniques, McArthur, Stasz, & Zmuidzinos (1990) found that effective tutoring is largely data-driven and also tactical, with tutors responding to errors of reasoning or results. It is most effective to use a combination of diagnostic tools and teacher observation, including formal and informal tools, to guide tutoring content (Gordon et al., 2004; Gordon, 2009). Tutoring is not just remediation of skills, it is helping student engage in higher-level thinking (Klenk & Kibby, 2000; Knapp, Shield, Turnbull, 1995; Sheets, 1999). In another study, students receiving "strategic tutoring," defined as tutoring that combined individualized instruction and assignment assistance, tutored students made gains over their untutored peers (Hock et al., 1995). Technology-based systems have been found to be effective in building math competencies by regularly tracking student performance and introducing new competencies

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sequentially as the student master them (Beck, Woolf, & Beal, 2000; Carnegie Learning, 2002; Middleton & Murray, 2002; Nguyen & Kulm, 2005). The MATCH Boston charter school focuses tutoring entirely on building each student's math skills as opposed to homework assistance; this tutoring has been linked specifically to large gains made by low-skilled students (Kraft, 2013). The MATCH program in Chicago found that math tutoring during the school day helped reduce course failures by 37 percent after just six-weeks of tutoring, which was attributed to individualized attention (Harms, 2013).

(3) THE TUTORING MUST BE OF ADEQUATE DURATION TO IMPACT STUDENT LEARNING NOT JUST IN THE SHORT-TERM, BUT TO CHANGE THE STUDENT'S LEVEL OF ENGAGEMENT IN MATH, REPERTOIRE OF LEARNING STYLES AND PERSISTENCE TO IMPACT LONG-TERM PERFORMANCE. Studies of tutoring have found that the higher dosage of tutoring received, the more benefit a student experiences (Smith, 2012; Ross et al., 2009). Emerging evidence with middle and high school learners points to the effectiveness of sessions lasting a standard class period of 45-50 minutes (Lauer et al. 2001; Smith, 2012). Some schools use tutoring effectively as part of the extended learning time model, where tutoring is embedded in the elongated school day, with two or more hours of tutoring weekly (Fryer, 2013; Kraft, 2013). Tutoring over a period of time builds more than subject matter skills, effective tutors also informally coach students on how to learn, good study skills, test preparation, and attentiveness during school, habits that must be accrued over time (Gordon, 2008).

(4) TUTORS MUST BE TRAINED AND PROVIDED WITH ON-GOING INPUT ON THE CONTENT AND APPROACH TO TUTORING FOR THE STUDENT TO REALIZE THESE BENEFITS. Successful tutoring programs often recruit and train volunteer tutors, including college students, recent college graduates, mid-life career changers, and retirees (Kraft, 2013; Harms, 2013; Hock, et al., 2001). Studies show that an effective tutor need not be a subject expert; they need mastery at a level above what the student is currently studying (Gausted, 1993). Most important to achieving long-term learning gains is training specific to good tutoring techniques (Hock, et al., 2001; Mathes & Fuchs, 1994; Shanahan & Barr, 1995). In order for tutoring to be most effective tutors need to have on-going collaboration with the classroom teacher who is assessing impact on student's classroom achievement and making needed adjustments to refine tutoring content or techniques (Gordon, et al. 2007). A trained tutor can observe and address the student's specific flaws in reasoning or results. More important than recognizing that a student answered incorrectly is identifying the type of error made because error type impacts how the error is best corrected (Hock, et al., 2001; McArthur, Stasz, & Zmuidzina, 1990). In interviews with hundreds master tutors across several decades, Grubb (2007) found they see

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themselves as "learning detectives," coaches, and mentors rather than "homework helpers" or "test-prep specialists." (5) TUTORING ALSO PROVIDES OTHER NON-ACADEMIC BENEFITS. Effective tutoring guides a student through the process of solving a problem and provides the students with the skills to answer a similar problem on their own in the future (Hock et al., 2001; Mathes & Fuchs, 1994; Shanahan & Barr, 1995), helping students to build their belief in their self-efficacy, the ability "to organize and execute the courses of action required to manage prospective situations" (Bandura, 1994). Academic self-efficacy has been linked to success and resiliency in college and career (Gore, 2006). Students build their own math self-efficacy by inventorying their previous mastery and overcoming of barriers related to the subject (Usher & Parjares, 2009). Tutoring also improves students' attitude towards the subject matter and school (Cohen, 1982). Gordon (2007) finds that for tutors to realize lasting academic and non-academic benefits, such as improved attitude towards the subject matter and school as well as improved self-efficacy, the tutor must not just know the academic material, they must connect with their tutee and build a respectful relationship. (iii) PROGRAM DESIGN AND ROLE OF MEMBERS. We propose a team of 20 AmeriCorps members. These twenty members will provide rigorous algebra (and some geometry) tutoring as well as basic math skills tutoring for 9th and 10th graders at four Dane County high schools: three comprehensive high schools in Madison (East-1,608 students, Memorial-1,832 students and West-2,032 students) and one in Middleton-1,911 students. The AmeriCorps members will provide tutoring for 120 students at the Madison schools and 50 students in Middleton, for a total of 170 students. With about 595 students not completing algebra each year, this permits us to tutor a majority of those students as well as some students struggling in geometry. The Madison schools will each have four AmeriCorps full-time tutors and one full-time AmeriCorps tutor coordinator; Middleton will have one full-time tutor and one full-time tutor coordinator. The tutor coordinator will recruit and place 240 volunteer tutors. (In our pilot the members were primarily volunteer coordinators, only a few members tutored full-time; to provide more frequent, consistent and high-quality tutoring we will have most of the members tutor and provide guidance to the volunteer tutors.) The grant will support all four schools to have an on-site AmeriCorps staff supervisor who has math teaching expertise. These seventeen members will be aided in this endeavor by one member serving at the University of Wisconsin Morgridge Center for Public Service recruiting and organizing teams of volunteer student tutors and two at United Way's Volunteer Center/2-1-1 recruiting and organizing teams of community volunteers and students from other local colleges. LOGIC MODEL. The attached logic model encapsulates how our analysis of the local problem, theory of change, reading of the research on high school math tutoring, and program

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experience will combine to deliver a evidence-based tutoring model that will result in measurable improvement in the math skills and academic achievement of low-performing high school students.

**CONTENT AND TECHNIQUES.** The content of the tutoring and tutoring techniques will be guided by the teachers. The session will be a mix of help with homework and test preparation and problem sets to bolster missing basic, algebra or geometry skills. These problem sets will come from the Renaissance Learning Accelerated Math library. These materials are aligned to learning objectives of the Common Core State Standards for Mathematics for Kindergarten through 12th grade. Selection of the objectives will be based on the teacher's knowledge of the student's work, the ACT Education Planning and Assessment System (EPAS), as well as Renaissance Learning Star Math assessments. The teachers will provide documentation of what teacher-initiated strategies have been tried, to assure that tutoring is the right support for the referred student. In Madison and Middleton this is part of the Multi-Tiered System of Support of Response to Instruction and Intervention.

**VOLUNTEERS.** The AmeriCorps members will recruit at least 240 volunteers to provide tutoring at the schools. The school-based tutor coordinators will connect with the volunteer recruiting on the University of Wisconsin campus as well as at United Way's Volunteer Center and [volunteeryourtime.org](http://volunteeryourtime.org) (local online volunteer clearinghouse linked to Volunteer Connection). United Way and the Morgridge Center are the recognized leaders in the community and on campus (respectively) for quality volunteer experiences. We are particularly pleased that during the pilot (and presumably going forward) this program attracts a much higher number and proportion of males and people with science, technology, engineering and math (STEM) backgrounds to service than most community service, especially in education.

**(iv) MEASURABLE IMPACT.** The overarching goal for Achievement Connections high school tutoring is for students to increase their proficiency and performance in math. Our national performance measure will report our success (1) helping 230 (75%) of the 307 students who receive at least 15 sessions of tutoring to master at least 10 assigned math objectives aligned to the Common Core State Standards on individualized progress monitoring assessments and (2) 185 (75%) of 246 students who receive 20 or more tutoring sessions meet or exceed target growth milestones for math on a normed assessment from the fall to the spring. In addition, we will monitor our success helping (1) 230 (80%) of 307 students completing 15 or more sessions to report (a) that the program has improved their confidence in their math skill, (b) that they feel more engaged in learning, and (c) that they believe their tutor cares about them as a person and wants them to be successful at school as well as that (2) 185 (75%) of 246 students who receive at least 20 sessions of tutoring will achieve their teacher-assigned goal (i.e. complete all homework assignments, achieve 3.0

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or higher in next grading period). We are confident we can accomplish these goals by the faithful implementation of the Achievement Connections model's core features and focus as shown in the cited research: (1) high school math, (2) underperforming students, (3) teachers' making individualized selection of students, goals and content of tutoring, (4) teachers strategically guiding tutoring strategies, using formal assessment tools as well as teacher observation, (5) students participating in tutoring two or more times weekly for 45-50 minutes, (6) screening of potential tutors for adequate math proficiency, (7) rigorous AmeriCorps and volunteer tutor training by school math staff, and (8) extensive training for AmeriCorps members and tutors in cultural competency, youth development, disability awareness, motivational interviewing and other strategies to engage, support and bolster the participating students in respectful, appropriate and effective ways.

c. MEMBER TRAINING. Our members receive extensive pre-service orientation, weekly in-service training and individualized training opportunities based on the needs and interests of each member. To foster deep partnership relationships, all 20 members, the 7 serving as tutor coordinators and the 13 serving as direct tutors, receive virtually identical training so that they can maximize their collaboration towards their common goal of supporting high school students' academic success.

ORIENTATION. All 20 members start their service mid-August with a two-week orientation (about 80 hours) delivered by United Way and the members' assigned school districts and placement schools. There are three sections. (i) The Introduction section covers AmeriCorps and national service, including the launch of citizenship training; an in-depth review of the Member Contract, including a review of allowable and prohibited activities; team building; and cultural competency, diversity and inclusion. (ii) The Achievement Connections tutoring section covers: an in-depth review of school district demographics and disparities in academic achievement; description of the tutoring program and the evidence base for its design; introduction to the program partners, notably their mission, goals, and role in the partnership; the member position descriptions and how their role fits into the partnership; how to conduct a tutor session; understanding youth development, boundaries, and motivational interviewing; tutor/volunteer management training; and how to use the Renaissance Learning assessment and skill-building programs. (iii) The district and schools section cover: cultural competency, Positive Behavioral Supports and behavioral resources, academic standards, other academic resources and interventions (e.g. AVID, PEOPLE), responsive classrooms and developmental designs, professional collaboration and reflection time; and communication and information systems. BINDERS. Members receive online and physical binders specific to their service site during orientation, with forms and program materials as well as practical information such as key

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contacts, volunteer rosters, and suggested first steps that will allow the new members to easily pick-up where the outgoing members left off. **COMPLIANCE WITH AMERICORPS TUTORING REQUIREMENTS.** Achievement Connections provides a structured, school-based, tutoring program consistent with AmeriCorps requirements for tutoring. The members and volunteers receive high-quality and research-based pre-service and in-service training aligned with the districts' math curricula and conducted in partnership with the district and school math departments. The content and tutoring strategies follow the guidance of the student's math teacher. **YEAR-ROUND TRAINING.** All our members attend Friday afternoon trainings (about 2 ½ hours) organized into eight topic tracks, with two or more tracks covered per meeting: math tutoring; volunteer management; goal setting and goals-based management (including outcomes tracking); professional skills (including meeting facilitation); interpersonal skills (including conflict resolution); cultural competence; career development (including informational interviews); and citizenship/national service. We start the year with a full plan and it is updated based on member and supervisor feedback and needs. Reflection on service and citizenship are an important component of meetings. Individual supervision and team meetings with members are designed to assure compliance.

d. **MEMBER SUPERVISION.** The Co-Program Directors and Site Supervisors will work as a team to provide a rewarding service experience by setting clear expectations, fostering a sense of united team purpose, creating opportunities for recognition of their impact on the lives of youth and the community, and providing strong support. We celebrate and emphasize that this is service and not a job by another name; they are part of the AmeriCorps and national service movement. One new full-time United Way staff person and one part-time Madison Metropolitan School staff member will serve as co-Directors of the program. The most important role of the Program Co-Directors is to support and guide the site supervisors in providing a positive member experience while achieving our program goals. They will provide intensive site supervisor orientation and oversight, including monthly supervisor meetings to discuss current issues, learn from our collective experience and knowledge, and plan training to respond to issues and themes as they arise. The United Way Co-Program Director will also provide systematic support for AmeriCorps members' professional development plans, including career coaching, higher-education planning, resume writing, letters of recommendation, and informational interviewing. **SITES.** The members will have a dedicated on-site supervisor at the high school overseeing the program. We learned from our pilot that on-going staff presence is needed in our large comprehensive high schools for our members to be integrated into the math team and school. The site supervisors will be math teachers, or people with a math and teaching background.

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They must also have strong supervisory experience and passion for supervising AmeriCorps members, many of whom are early in their careers and benefit from extra professional guidance. Primary responsibilities include: (1) co-organize the initial AmeriCorps team training; (2) establish clear expectations through individualized program, training, and professional development goals; (3) hold one-on-one supervision meetings at least bi-weekly, and conduct mid-term and end-of-term evaluations; (4) serve as the liaison between the members and the school principal and dean/assistant principal in charge of academic support programs to implement the terms of the Memorandum of Agreement, (5) participate in weekly full-team meetings to provide training, support and direction to the members, responding to member-identified needs, (6) assure members and the volunteers they coordinate do not engage in prohibited activities through announced and unannounced oversight techniques, such as random formal checks that they are wearing gear that count in their performance review, or quarterly signed affirmations by members and volunteers that they have not been engaged in any of the AmeriCorps prohibited activities during service hours, and (6) actively participate in January (semester break) reflection and planning retreat, celebrate successes, identify challenges, and develop program improvements.

e. AMERICORPS IDENTIFICATION. United Way of Dane County is proud of its affiliation with the AmeriCorps program. The most important way to assure members identify themselves as AmeriCorps at all times is building excitement about AmeriCorps service into all of our language, training, supervision and work. Every member is helped to develop an "elevator speech" about AmeriCorps and the Achievement Connections program and our marketing team works with the press to generate stories about the program -- reminding the reporters to identify the program as AmeriCorps. Host sites and members are required to co-brand the program and are provided with AmeriCorps and co-branded materials (i.e. magnet nametags, business cards, window decals) and branding guidance, such as the format for their email signatures. We formally review written materials and visit sites to assure co-branding as well as require site supervisions to affirm quarterly that the members were their gear and program is clearly branded AmeriCorps every day. Members are coached in preparing reflections on their AmeriCorps experience to help them communicate its importance to the community.

### Organizational Capability

a. ORGANIZATIONAL BACKGROUND AND STAFFING. UNITED WAY. United Way of Dane County's mission is "to unite and focus the community to create measurable results in changing people's lives and strengthening our community." In 2001 we transformed to a community impact

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model where we align our work to address the root causes of problems and measure our success by community-level outcomes. United Way of Dane County is recognized as a "Center of Excellence" among more than 1,200 United Ways nationally for our leadership work which provided a blueprint for reshaping the role of the entire United Way Worldwide network. United Way of Dane County is led by a thirty-nine member Board of Directors comprised of leaders from all sectors of our community, including business, academia, labor, health care, justice, and government. Our high school tutoring work is overseen by our Madison and Middleton Achievement Connections Leadership Teams, co-chaired by United Way's CEO and the MMSD and Middleton Superintendents. Each includes top community leaders, including the Mayor, president of the Madison College, police chief, and educational researchers. Elisabeth Marx, Senior Director of Strategic Collaborations at United Way, will have oversight responsibility for the program, including compliance with AmeriCorps rules and provisions. Ms. Marx has a M.S. in Nonprofit Management and Policy Analysis and 30 years' experience in the nonprofit sector, including nine as an AmeriCorps Program Director and ten as executive for a private family foundation. She will assure faithful implementation of the research-based model as well as assuring that the site managers use data on a regular basis to manage towards success in helping each program participant achieve their goals. Nick Wood, Director of Finance and Grants Management oversees fiscal monitoring and reporting to Serve Wisconsin. He conducts fiscal audits of all of AmeriCorps agency partners with sub-grants. Kathy Martinson is the Director of the Volunteer Center and 2-1-1 at United Way where she has lead organizational development services for nonprofit agencies. Megan Miller, Assistant Director of Civic Engagement at the Morgridge Center, holds a B.S. in Community and Nonprofit Leadership and is an AmeriCorps\*VISTA alumnus.

**MADISON SCHOOLS.** Jennifer Cheatham started as the new Superintendent of the Madison Metropolitan School District in July of 2013. After an extensive community engagement, external review and planning process, she launched a new Strategic Framework for the schools that defines three overarching goals: (1) Every student is on-track to graduate as measured by student growth and achievement at key milestones; (2) Every student has access to a challenging and well-rounded education as measured by programmatic access and participation data; and (3) Every student, family and employee experiences a customer service-oriented school system as measured by school climate survey data. The core of the plan is for each school to develop its own School Improvement Plan (SIP) that focuses on the three pillars of High Standards, Good Teaching, and Data Use. The design presented here was co-developed and approved by each school principal, assistant principal or dean with program oversight responsibilities, and the chair(s) of the math departments and each school

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was required to show how Achievement Connections high school tutoring fits into their SIP. The district office, including the Director of Partnerships and Innovation and human resources, and the high schools participated in defining the Site Coordinator positions. MIDDLETON. Denise Herrmann has been the principal at Middleton high school for over seven years; she holds a doctorate in Educational Leadership and Instruction and has been with the Achievement Connections program since its inception, providing insights and leadership to refine the model to achieve the strongest results.

b. COMPLIANCE AND ACCOUNTABILITY. At the beginning of the program year, we prepare a detailed Memorandum of Agreement/Host Site Agreement with each member site that details responsibilities and expectations regarding member supervision and management, grants administration, performance measures, and reporting, including compliance with AmeriCorps rules regarding prohibited activities for supervisors, members and volunteers. Separate meetings are held at each site at the beginning of the year with the Program Co-Directors, Site Supervisors, members and any other key site liaisons to go through the Host Site Agreements, the AmeriCorps Position Description, and the Member Contracts section by section. The Program Co-Directors and Site Supervisors will meet monthly to plan and coordinate responsibilities, review CNCS/AmeriCorps requirements, review program results, and address opportunities and challenges, including compliance. This is an interactive, partnership meeting, where feedback is two-way, allowing for maximum program performance. We also follow-up during the year with written program and fiscal monitoring guided by a formal document that reviews all of the major performance and compliance areas. We give the specific, tight timeframes to remedy any problems and then follow-up to make sure the appropriate changes have been made. The United Way Program Co-Director meets with fiscal staff monthly to review our fiscal status and manage the budget. Our expertise in grants management is multi-faceted, spanning program performance, agency operations, and fiscal stewardship. United Way awards program-specific grants to about 120 nonprofit agencies totaling up to \$8 million using rigorous application, rating, review, monitoring and reporting systems to assure agencies' program, organizational, and financial capacity, quality of leadership, past performance, integrity, efficiency, innovation, effectiveness, and community involvement, in accordance with AmeriCorps regulations.

c. PAST PERFORMANCE. The Mobilizing Skilled Volunteers AmeriCorps program operated for three years: 2010-11, 2011-12 and 2012-13. Our enrollment rates were an excellent 100%, 104.5% and 81.8%. Our retention rates were 90%, 95.5% and 81.8%. As discussed later, problems with one partner

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were primarily responsible for losing members in the third year. We met our performance measure for financial literacy and volunteer management all three years and our new school readiness performance measure the one year we set it (2012-2013). The high school tutoring program was slower to launch and be able to demonstrate results. We exceeded the performance measure goals related to the number of students tutored and the number completing the minimum number of tutoring sessions. However, we did not meet the goal for the number showing measurable improvement in math performance. Fortunately, the problem was mostly related to delays in implementing the pre- and post- assessments rather than in the efficacy of tutoring. The program helped 67% of students receiving 10 or more sessions to achieve measurable improvements in their math performance, but we only had pre- and post-assessment results for students served in the spring semesters. Implementation problems included (1) the members had to get written parent/guardian permission to assess students, substantially delaying the pre- assessments; (2) limited input by students' teachers on math learning objectives; and (3) too few members and volunteers per site to provide our ideal of two or three tutoring sessions per week for at least a semester. We have addressed these problems fully: (1) the AmeriCorps staff site coordinator will be on the school payroll and fully aligned with the math department staff, able to provide assessments directly to students; (2) only math teachers can refer students to the program and the teacher is required set and update goals throughout the students' participation; and (3) there will be four member-tutors and one member tutor coordinator at each of the large high schools to assure rapid start-up, increase the quantity of tutoring, and improve quality control.

d. CONTINUOUS IMPROVEMENT. Continuous improvement is built into our compliance and accountability systems (see above). In addition, United Way produces a detailed annual internal Management Report that compiles our progress on our goals as well as an external Annual Report on our programs and finances. Each department holds an annual retreat to review their prior year performance and set goals for the following year. Cross-departmental staff teams develop action plans for cross-department goals and objectives. Each staff member develops personal goals and objectives aligned to the organizational goals. Review is ongoing by supervisors, with formal bi-annual assessments. Every three years, United Way participates in a national assessment of our performance on Standards of Excellence established by the network of United Ways nationally.

### **Cost Effectiveness and Budget Adequacy**

(a) COST EFFECTIVENESS. Our cost per Member Service Year of \$13,083 is below the maximum allowable. United Way of Dane County has a budget of \$18,215,774. The vast majority of our income

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(76%) comes through gifts from individuals and corporations in our company-based "campaign." Other income is generated through federal grants (6%), non-campaign contributions (6%), and investments/other income (12%). With a total budget of \$742,083 and 410 students receiving tutoring, the program cost of \$1,810 per student per year is modest to significantly increase the math performance of high school students who are at-risk of failing algebra or geometry, in many cases with math skills at a 5th or 6th grade level. If these students were tutored by full-time math teachers, the cost would be at least \$1.4 million ( $\$55,000 + 30\% \text{ benefits} \times 20 \text{ teachers tutoring } 20 \text{ students each}$ ). This program will mobilize at least 240 volunteers to provide at least 6,000 hours of service. The Independent Sector (2012) calculates the value of a skilled volunteer at \$21.79 per hour (equivalent to about \$35,000 annually with benefits, which is also about the average salary in Madison); which places the value of our volunteer tutors at a \$130,740. (b) BUDGET ADEQUACY (12 points). All key activities in our program design are supported by specific line items in our budget. The budget includes the required costs specified by the Corporation as well as personnel, transportation, training, supplies and other expenditures needed at each site to meet program goals. Criminal history checks and FBI checks have been budgeted for all new members and new supervisors who will have direct contact with the members. We have leveraged community matching contributions and partnership arrangements to keep our operational costs as low as possible. Our proposed budget is based on fifteen years of experience engaging VISTAs and AmeriCorps members in the work of mobilizing and supporting community volunteers to address critical community issues. MATCH SOURCES. CASH. The proposed budget incorporates a 64% cash match of non-federal funding from the United Way campaign. These are entirely local community dollars from businesses, individuals and foundations. (No government funding is used for the match.) Our campaign has grown at a rate of over 4 % over the past two years and we anticipate no problem in meeting the match requirement each year; AmeriCorps match is a top priority in annual budgeting. IN-KIND. United Way and our partner agencies are contributing substantial support to make this program a success: (1) MMSD and Middleton space and supplies of \$2,400 (in budget) and training (not in budget). (2) Morgridge Staff of \$5,198. Although as a new program we are only required to provide a 30% match, we are committing 57% from sources (cash and in-kind) other than the Corporation to keep our reliance on federal support at a level that we can wean away more readily. United Way is able to assure this level of support for at least the next three years.

### Evaluation Summary or Plan

United Way of Dane County places a high priority on precisely tracking our program implementation

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and outcomes. As can be evidenced in this program redesign, we use data on student enrollment rates, demographics, prior academic classroom and standardized test performance, amount and duration of participation, content of tutoring and other variables to interpret participant outcomes and for continuous program improvement. We will work with an independent evaluator and the research and evaluation departments of the Madison Metropolitan School District and the Middleton/Cross Plains Area School District to conduct an in-depth evaluation of this program. As you know, a challenge of evaluating tutoring is demonstrating the added value of the program. Students are working with different teachers and may be benefiting from other services. In high school, unlike at the elementary level, math assessments are not conducted consistently across schools throughout the school year, so we do not have a ready comparison group to benchmark the progress of our students. The Renaissance Learning Star Math assessment is a nationally normed and validated measure of math achievement and instructional level that can be used to benchmark our students' growth against nationally normed growth expectations on high school math. We are also exploring alternative approaches to evaluating, such as comparing the performance of Achievement Connections tutored students to a demographically and academically matched group of students who did not receive tutoring on the ACT's Educational Planning and Assessment System. Key goals are to (1) assure Achievement Connections tutoring is making a statistically significant impact on student math knowledge and performance and (2) refine our understanding of the key components of the tutoring and thresholds of participation (i.e. at least 12 sessions in a semester or at least 2 times per week for ten weeks) that predict greater gains in student performance.

### Amendment Justification

NA

### Clarification Summary

CLARIFICATIONS 4/8/14

#### A. Budget Clarification

1. Staff Travel and Member Travel: Please justify the mileage rate of \$0.565, which exceeds the 2014 federal rate.

\* We have adjusted the Staff Travel and Member Travel to reflect the 2014 federal rate of \$0.56.

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2. Based on a review of the cost effectiveness section, the application did not make a compelling case for the requested cost per member service year (MSY). Please consider decreasing the cost per MSY by revising the CNCS share of the program budget.

\* We have lowered the CNCS share of the program cost to lower the cost per MSY from \$13,083 to \$12,859, the same cost per MSY as in prior years.

### B. Programmatic Clarification Responses

1. Please articulate the criteria you will use to select and qualify tutors and certify that the selected members will meet AmeriCorps requirements in 45 CFR Sec.2522.910.

\* AmeriCorps Members enrolled to serve as Tutors for the Achievement Connections program must have completed at least two years of college and/or have an Associate's Degree. Additionally, they must pass an algebra proficiency test. The test has at least 10 algebra problems taken from chapter review tests in an algebra text book. Tutors are expected to answer at least 80% of questions correctly to be approved to tutor.

\* As noted in the application, Achievement Connections provides a structured, school-based, tutoring program consistent with AmeriCorps requirements for tutoring.

\* The orientation, training and materials for the AmeriCorps Tutors are high-quality, reflecting research-based best practices, and are aligned to the school district's and specific high schools' math curriculum, as well as the State of Wisconsin's content standards. School math staff and staff from the district's curriculum and instruction departments participate in the development of the training as well as presenting it to the AmeriCorps Tutors. Specifically, AmeriCorps members serving as Tutors participate in (1) orientation, (2) on-going training sessions and (3) one-on-one meetings with the staff Volunteer Coordinator, including periodic observations of their tutoring sessions. The tutor orientation is run jointly by the school districts, including math team leaders and professional development specialists, and United Way. The orientation includes: (a) introduction to the Achievement Connections program; (b) reflection on why they want to tutor and prior tutoring

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experiences; (3) information about tutor expectations; (4) description of what a productive tutoring session looks like, including a critique of taped sessions from prior years; (5) how to work with students, including tutoring role play; (6) Five-step method for working on math problems; (7) orientation to Renaissance Math and basic skills tutoring; and (8) orientation to the assigned high school and math program.

\* The AmeriCorps Tutors will have a dedicated on-site staff supervisor at their high school overseeing the program who are trained math teachers or have strong math and teaching/tutoring background. A core responsibility will be to provide daily oversight of the integrity of the tutoring. The content and techniques of tutoring used by the AmeriCorps tutors, and assessment of student progress, will be guided by Renaissance Learning Star Math assessments and progress on Accelerated Math problem sets (exercises).

\* The supervisors and program directors also provide weekly in-service team training, which includes bi-weekly sessions specific to improving tutoring practices, from cultural competency and working with youth to review of the research on math tutoring and math strategies.

2. Grant Start Date and Member Enrollment Period: In the Clarification Summary field, please enter a statement confirming the desired grant award start and member enrollment period start.

\* Our start date remains 8/15/2014 and end date 8/14/2015. If earlier start dates are requested we can start on 8/1/2014 and end 7/31/2015.

### C. Performance Measure Clarification

Please provide the following information directly in the performance measure clarification section of the application. If necessary, add additional narrative to the Clarification Summary field.

1. In the description of the intervention in the narrative and performance measures, the dosage is listed as "generally" 45-50 minutes. Please list the minimum dosage required for a tutoring session to be counted.

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\* The minimum session length is 45 minutes to be counted as a full session. This number is based on actual class period lengths at our participating high schools: East - 50 minutes, Middleton - one-half of a 90 minute block = 45 minutes, Memorial - 50 minutes, and West - 52 minutes.

2. In ED5, there are two levels of achievement listed for different categories of students. Please write the performance measure so that it clearly describes only one indication of how much change must occur to be counted as having improved academic performance.

\* Success is measured as 230 (75%) of the 307 students who receive at least 15 sessions of tutoring demonstrating mastery on at least ten learning objectives. The learning objectives are assigned to the students in an area of need identified by the Star Math assessment and selected by their teacher.

3. For EN5, please describe what "demonstrating mastery" means as a form of measurement that a learning objective has been achieved.

\* The threshold used for determining mastery of learning objectives is that the student answers at least 80% of problems correctly on the post-test.

\* Students are assigned learning objectives and practice problem sets (also known as exercises) based on their failing to answer the questions correctly on the Star Math pre-test.

### D. Strategic Engagement Slots Clarification

1. What percentage of slots will be targeted to recruiting members with disabilities? What is the program's plan, if any, for outreach and recruitment of members of the disability community?

\* United Way has strong partnerships with seven local organizations serving people with disabilities. Including agencies focused on helping people with disabilities obtain and thrive in employment and volunteer positions. We will partner with these agencies to recruit AmeriCorps members as well as to help individual successfully navigate the application process and be successful AmeriCorps members, including providing accommodations as necessary.

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2. In order to increase the number of individuals with disabilities serving as AmeriCorps members, CNCS is offering applicants the opportunity to request additional MSYs to be filled by AmeriCorps members with disabilities.

\* We are not requesting additional MSYs for people with disabilities.

### E. No-Cost MSY Clarification

MSY with no program funds attached: Applicants may request No-Cost MSYs. These additional no-cost MSYs are national service positions in which no grant funds will be awarded. In other words, grantees could receive additional AmeriCorps positions but no additional grant funds. Programs will be responsible for using their own or other resources to pay program costs, member support costs and other operating expenses. Keep in mind that full-time AmeriCorps program costs include expenditures for the AmeriCorps living allowance, health care and criminal history checks. Programs are not required to pay living allowances or cover health care for less-than-full-time members.

\* We are not requesting no-cost MSYs.

### F. Healthcare Clarification

1. Please provide the name of the health insurance provider the program is proposing to use to insure the AmeriCorps members.

\* We will be directing members requesting coverage who do not have coverage to Unity UW Health. Specifically, we are budgeting to have members use Unity UW Health's Silver B with Dental Plan. We will reimburse them up to \$59 per month (\$708 annually) for this coverage, the premium level for people with an income of \$12,100 after tax credits. Achievement Connections provides a \$12,100 living allowance for full-time members.

2. How did the program select the provider? (for example, direct marketing, through the Health Insurance Marketplace or other means)

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\* We selected this provider and plan based on a careful review of the Health Insurance Marketplace.

3. Does the proposed budget for member healthcare provide for Minimum Essential Coverage (MEC) coverage, as defined by the Affordable Care Act (ACA), for your full-time members?

\* The Unity UW Health Silver B with Dental Plan will provide Minimum Essential Coverage (MEC), as defined by the Affordable Care Act (ACA), for our full-time members.

4. If not, what adjustment to the budget is necessary in order to provide Minimum Essential Coverage (MEC)?

\* We have updated our budget to reflect a per member premium of \$59 per month (\$708 per year) for full-time members.  $\$708 \times 20 \text{ members} = \$14,160$ . We are budgeting as though all members will request coverage. Members will purchase the service and we will reimburse based on receipts for premiums paid. Our prior experience is that about half need coverage and the other half are covered under their parent's or spouses' plans.

5. If the program does not have enough information to answer question (4), please explain why not and/or what prevented the program from being able to obtain the necessary information.

\* We have done our best to navigate the system. It is our understanding that if an AmeriCorps member is in a household with other sources of income, it does not change our obligation with regard to the amount we are able to pay towards the member's premium.

### Continuation Changes

NA

### Grant Characteristics