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Executive Summary

AARP Experience Corps will have 605 AmeriCorps members (32 QT and 573 MT) who will tutor children struggling to read at grade level in kindergarten through third grade in 104 schools in: Baltimore City, MD; Bay Area, CA (Oakland, San Francisco, Berkeley); Boston/Revere, MA; Minneapolis/St. Paul, MN; New York, NY; Philadelphia, PA; Portland, OR; and Washington, DC. At the end of the first program year, the AmeriCorps members will be responsible for student academic improvement in reading/literacy performance (measured by standardized assessment data). In addition, the AmeriCorps members will leverage an additional 679 volunteers also engaged in the same type of tutoring to even more kindergarten through third grade children in need of reading assistance. This program will focus on the CNCS focus area of Education. The CNCS investment of \$1,664,173 will be matched with \$1,800,208, \$ 1,005,076 in public funding and \$795,132 in private funding.

Rationale and Approach/Program Design

a. Problem/Need - Reading proficiency by the end of third grade is a well-studied and widely accepted indicator of success in school and life. If a child cannot read well by fourth grade, they will continue to fall farther and farther behind in all academic subjects. A 2011 Annie E. Casey Foundation study found that children not reading well by the end of third grade are four times more likely to drop out of high school. According to the 2013 National Assessment of Educational Progress (NAEP), and despite progress in some states, only 35 percent of fourth graders across the country are proficient in reading. This shortfall in reading is particularly profound for low-income children. In 2013, 80% of low-income fourth grade students failed to reach reading proficiency as compared to 49% of students who are not low-income (NAEP, 2013). A 2010 Annie E. Casey Foundation report asserts: "If current trends hold true, 6.6 million low-income children will be at increased risk of failing to graduate from high school on time because they won't meet NAEP proficiency in reading by the end of third grade." [1]

In many of the communities we serve, students are performing well below the national average. Our focus is on underperforming schools. Of the schools served by our sub-recipient group, 27 are SIG locations and 100 are Title I. AARP Experience Corps' sub-recipients will implement the AmeriCorps program in 104 high-need elementary schools in 12 Local Education Agencies (LEAs), where the overall student population is predominately minority and low-income and where students show high

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levels of need for academic support:

- * Baltimore City - 87% of students in our schools qualify for free/reduced meals (FARM); 34% of our third graders do not meet reading proficiency; the city's poverty rate is 22.9% and its unemployment rate is 6.3%.
- * Bay Area - an average of 61% (Oakland) and 52% (San Francisco) of our third graders are not reading proficient; 86% and 67%, respectively, qualify for FARM. At the single school we serve in Berkeley, the truancy rate is a whopping 40% (state average is 29%); 40% of students qualify for free/reduced meals; and 24% of third graders not reading proficiently. Oakland's poverty rate is 19.4% and the unemployment rate for the San Francisco-Oakland statistical area is 6%.
- * Boston - 94% of our students qualify for FARM; 67% of third graders are not reading proficient; Boston's poverty rate is 19.5% and its unemployment rate is 5.8%.
- * Minneapolis/St. Paul - 79% of our students qualify for FARM; 63% of third graders are not reading proficient; the unemployment rate is 4%.
- * New York City - 100% of our students qualify for FARM; 39% of third graders are not reading proficient; in the two schools served, the student population is 95% black and Latino; NYC's poverty rate is 21.3% and its unemployment rate is 6.9%.
- * Philadelphia - 88% of our students qualify for FARM; 64% of third graders are not reading proficient; the poverty rate is 22.9% and the unemployment rate is 7%.
- * Portland - 81% of our students qualify for FARM; the percentage of third graders not reading proficient ranges from 36-75; the unemployment rate is 6.2%.
- * Washington, DC - 92% of our students qualify for FARM; the percentage of third graders not reading proficient is 61%; DC's poverty rate is 20.2% and the unemployment rate for the DC area is 4.9%.

b. Logic Model & Evidence Base - THEORY OF CHANGE/LOGIC MODEL - Experience Corps is a proven, effective intervention for improving the reading proficiency of kindergarten through third grade students. It engages the experience and skills of adults 50 and over to target underperforming students in low-income, high-need communities.

AARP Experience Corps proposes to engage 605 AmeriCorps members over the age of 50 (91% of our current members are 55 or older) in 12 LEAs and 104 elementary schools to serve more than 30,000 students over the course of three years. Following Experience Corps' logic model, AmeriCorps

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members will receive a combined 25 hours of pre- and in-service training to effectively tutor kindergarten through third grade students in reading. Members are assigned to serve as tutors in our one-on-one, small group, and classroom assistance intervention models. These interventions are implemented in conjunction with the needs of individual schools (service locations) and members' interests and skills, which are determined in the application and screening process. In the one-on-one/small group intervention, students will receive a minimum of two, 30 minute tutoring sessions per week, totaling at least of 35 sessions per school year. In classroom assistance, the teacher assigns the member to work with a small group, individual student, or an entire class while he or she works with other students in the classroom. The member provides service for an average of 3 days per week for an average of 4 hours per day (up to 15 hours per week) to the same classroom for the entire school year. For both interventions, student sessions focus on the skills needed to ensure the student improves academic performance in reading by focusing on the five components of reading (phonemic awareness, phonics, vocabulary, fluency, reading comprehension). Members are typically trained in August and September and actively tutor in schools from September through May.

In addition to improvements in students' reading proficiency, outcomes of the Experience Corps interventions include improved classroom behavior, teacher satisfaction with the quality of assistance, and increased quality of life for members. The anticipated, long-term outcome of our intervention is improved high school graduation rates, by giving underperforming children the opportunity to catch up with their peers in reading proficiency by the end of third grade.

The Experience Corps program uses a variety of indicators and data collection tools to measure and track program outcomes. We use standardized assessment data to track student academic improvement in reading. Improvement in student behavior is measured by teacher ratings of student participation, concentration and motivation on beginning and end-of-year surveys. All members participate in an end-of-year outcome survey to gauge improvements in their quality of life and satisfaction with the program. Teachers in participating classrooms take part in an end-of-year evaluation to get feedback and measure their satisfaction with the overall quality of assistance provided by the Experience Corps program and volunteer members. We also track the numbers of: students served (and through which form of intervention -- one-on-one, small group and/or classroom assistance); tutoring sessions per student; new schools engaged; volunteer members recruited, trained and engaged in classrooms; volunteer members retained; and hours members

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served in classrooms.

Since 2001, Experience Corps has demonstrated the effectiveness of engaging older adults as AmeriCorps members. With over 10,000 Americans reaching the age of sixty every day, older adults represent a powerful and expansive human resource. Older adults are seeking ways to engage in community solutions and AmeriCorps provides them with the opportunity, training, support, and "esprit de corps" to do so. AARP Experience Corps works in partnership with its AmeriCorps sub-recipients to provide meaningful service that is changing the lives of members and the students, schools, and communities they serve. AARP's access to older Americans across the country further strengthens our ability to reach and connect with this cohort of older adult members.

The program's ability to recruit and retain a viable corps of older adults is key to sustaining the program. Our AmeriCorps retention rate is over 80%; our partnership with AARP, which has over 40 million members, is leading to growing interest among older adults to join the effort and to exploration into introducing Experience Corps in new locations. It is also worth noting that AARP Experience Corps has been able to recruit a very diverse corps reflective of the communities we serve. For example, in Boston over 70% of members live in our service communities and most live within a one mile radius of their service sites. Our corps is 68% African American, 28% White, and 84% female, serving a student population that is 61% African American, 21% Latino, and 12% White.

AmeriCorps members bring critical capacity to each local community and school in which they serve. By engaging AmeriCorps members, who serve 10-15 hours per week, we are able to have a consistent presence in our schools and communities. These powerful agents of change allow each sub-recipient to provide high- quality service and serve more children than would otherwise be possible. Furthermore, members boost the resources that schools have available, thereby increasing the individualized attention each student receives. The program also builds the capacity of local communities by helping hundreds of older adults become more actively engaged and financially stable.

Our AmeriCorps program is in direct service of AARP Experience Corps' core mission and is integrated seamlessly into our overarching program. AmeriCorps members serve side by side with other Experience Corps volunteers, creating a broad network of older adults serving together.

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EVIDENCE BASE - AARP Experience Corps has established itself as a high-quality, strong evidence-based tutoring program. In 2009, Washington University in St. Louis, with Mathematica Policy Research, released its evaluation measuring the one-year effect of the AARP Experience Corps one-on-one tutoring on specific literacy skills for first through third grade students.[2] The study was conducted in three Experience Corps sites -- Boston, MA, New York City, NY, and Port Arthur, TX. For the duration of the study, both Boston and New York City had a significant percentage of their volunteer corps engaged as AmeriCorps members. Results showed that students who worked one-on-one with AARP Experience Corps tutors for a single school year, experienced more than 60% greater gains in two critical literacy skills--sounding out new words and reading comprehension--compared to similar students who were not served by Experience Corps. Experience Corps tutors delivered similarly significant results for students regardless of gender, ethnicity, grade, classroom behavior, or English proficiency. In 2010, the U.S. Department of Education's What Works Clearinghouse recognized the study as "consistent with What Works Clearinghouse evidence standards," and as a "well-implemented randomized controlled trial." [3] A follow-up study by Johns Hopkins University showed similar positive results in students participating in the Experience Corps program in a classroom assistance setting in Baltimore, MD. [4] Experience Corps has also been evaluated by Public/Private Ventures, the American Institutes for Research, and Policy Studies Associates.

c. Member Training - AARP Experience Corps sub-recipients provide a breadth of training opportunities, designed to prepare members for service in an elementary school setting, ensure a quality experience for members and outcomes for students, and support strong member retention. Once screened and selected for the program, members receive an average of 25 hours of pre- and in-service training that covers: orientation to AmeriCorps and national service; prohibited activities; Experience Corps' mission and programs; policies, procedures, and paperwork required; basic training in child development and early learning; academic enrichment including the five components of literacy; working with English Language Learners; communicating with teachers and school staff; and team-building. Once members have been placed in a school, sub-recipients also provide additional orientation specific to the school community including behavior policies, a tour of the facility, and an introduction to teachers and staff. Our training is continually evolving; most recently, we have aligned all of our trainings with the Common Core State Standards. Our comprehensive training has led to consistently high performance by our members. In 2012-2013, 93% of Experience Corps

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members were rated as "good" or "excellent" by teachers in their ability to address student learning needs.

Pre-service training is supplemented by monthly in-service training as well as ongoing coaching at service sites. In-service training provides further professional development and learning opportunities that support the tutor in assisting students in reaching grade level proficiency in reading. In-service training is aligned with the standards set by each LEA and may also focus on working in teams, spotting signs of abuse, supporting children who are grieving, and other timely topics.

d. Member Supervision - All potential members are screened to ensure they possess a high school diploma or GED and to evaluate their propensity to participate in a school-based literacy program. They are required to submit to a mandatory criminal background check (National Sex Offender Public Registry, state criminal background check, and FBI background check) and, in some cases, a reading competency test. Potential members are also interviewed and asked to provide two personal or professional references.

Sub-recipients use a combination of staff positions to provide members with effective supervision. All sub-recipients have a program manager/coordinator whose responsibilities include ensuring program integrity, implementation, and compliance. Reporting to the program manager, site coordinators/community engagement specialists usually oversee a cluster of schools, and ensure that members and volunteers receive adequate onsite supervision and support. They maintain regular contact with school personnel and are in charge of data collection at their schools, monthly team meetings and, at many sites, timesheets. Additionally, most sub-recipients have team leaders, which are non-AmeriCorps members in leadership roles at the schools. They provide an extra layer of support and supervision in the school often acting as the primary contact with school staff and a point of contact for members. Member service is also overseen by a teacher or reading support specialist on a regular basis. In 2012-2013, 98% of Experience Corps members were satisfied or very satisfied with the supervision they received from Experience Corps site coordinators and staff, as reported through member satisfaction surveys.

Twice per year, sub-recipients conduct a performance review for each member. The evaluations provide the member with an opportunity to receive feedback about the effectiveness of their service

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and develop their volunteer skills. Check-ins allow members to discuss any challenges or problems they are having and to develop plans to address them. On a monthly basis, staff lead team meetings at each service site to answer questions, address issues and check in with members about their progress. Program staff meets regularly to share program successes, challenges, and solutions.

e. AmeriCorps Identification - AARP Experience Corps is strongly committed to appropriately identifying its AmeriCorps sites and members. Every AARP Experience Corps AmeriCorps service location has a prominently placed AmeriCorps banner, and all AmeriCorps members wear an AmeriCorps button every day they serve. In addition, specific pre-service training for all volunteer members reviews what AmeriCorps is and explains how AARP Experience Corps, AmeriCorps, and they -- as AmeriCorps members -- are part of a larger national service movement.

References:

[1] Annie E Casey Foundation. (2010) Early Warning! Why Reading by the End of Third Grade Matters. Baltimore Maryland, Annie E. Casey Foundation

[2] The study, conducted by a team at Washington University in St. Louis with assistance from Mathematica Policy Research, can be viewed here: <http://news.wustl.edu/news/Pages/13890.aspx>

[3] What Works Clearinghouse Quick Review:

<http://ies.ed.gov/ncee/wwc/publications/quickreviews/QRReport.aspx?QRID=129>

[4] Rebok GW, Carlson MC, Glass TA et al. Short-term Impact of Experience Corps Participation on Children and Schools: Results from a Pilot Randomized Study. J Urban Health. Mar. 2004; 81:71-93.

Organizational Capability

a. Background & Staffing - BACKGROUND & MANAGEMENT - Experience Corps had its beginnings in a 1988 concept paper by John Gardner, former Secretary of Health, Education, and Welfare. Gardner's idea was to create a new institution that would mobilize the time, talent, and experience of older Americans to revitalize their communities. Based on this premise, Experience Corps was launched as a project of Civic Ventures in 1995 as a 12-school pilot project in five cities across the country. In 1997-98, with support from the Corporation for National and Community Service and other funders, Experience Corps began a period of rapid expansion. In January 2012, AARP and Experience Corps merged to create a national movement through which older adults throughout our country can become agents of social change. This affiliation supports Experience Corps in achieving its goal of serving the largest number of children possible across the country. AARP Experience Corps

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operates four local branches in Philadelphia, Baltimore, Chicago and Washington, DC. The 17 other local programs are run by affiliated organizations in accordance with national programmatic and operating standards. Today, more than 1,700 Experience Corps members serve over 27,000 elementary school students in 21 communities around the country, and we are poised for transformative growth.

AARP Experience Corps is governed by an independent board of distinguished educators, business and foundation executives, and non-profit sector leaders. Reporting directly to CEO Lester Strong, the Experience Corps senior management team is comprised of professionals with extensive non-profit work experience in the fields of education, policy, and social work. The senior team is responsible for guiding the strategic growth of the organization and for ensuring that the goals of the AmeriCorps program are met.

STAFFING - AARP Experience Corps is the lead applicant for this AmeriCorps request to CNCS. Direct AmeriCorps service is provided on the ground in partnership with eight local sub-recipients (3 branches and 5 affiliates) in 12 LEAs. Laura Chambers and Dana Krug provide primary administrative oversight for the application and are supported by a robust Grants Management Team as described below.

* Laura Chambers, Director of Field Services, oversees planning and implementation, and budget development for AARP Experience Corps branches. She is also responsible for 17 local AARP Experience Corps program run by affiliate organizations. She has over 20 years of front-line advocacy experience. She served as the deputy executive director of the Global AIDS Alliance, as the chief operating officer for Civic Ventures and as vice president of the Advocacy Institute.

* Dana Krug, Manager of Finance and Corporate Governance, has 25 years of experience in finance and operations, including 14 years serving in the non-profit sector. She leads the finance, reporting, procurement, volunteer payroll, financial grants management and corporate governance functions for AARP Experience Corps. She is the Corporate Secretary and supports the Chair of the Board of Directors in managing AARP Experience Corps' governance process in accordance with regulatory requirements and best practices.

* Joanna Wald, Grants and Compliance Advisor, and Stephanie Okpala, Literacy & Impact Specialist, oversee risk management and grant compliance, including training, day-to-day technical assistance, monitoring and data collection. With three and two years of membership, respectively, on our Grants

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Management Team, Ms. Wald and Ms. Okpala are trained in AmeriCorps provisions, regulations, training, technical assistance, and oversight and have attended the AmeriCorps Financial and Grants Management Institute and Annual grantee meetings.

* Rachel Cannon, Literacy & Impact Specialist, provides training and technical assistance on using the Salesforce database system to track program data for all of our AmeriCorps sites. Ms. Cannon also assists in data importation to ensure that data is complete and accurate.

* Jasmine Milner joined the Grants Management Team in 2012 and oversees fiscal grants management. She monitors headquarters and branch expenditures, the distribution of AmeriCorps funds, fiscal compliance with OMB circulars and CNCS grant regulations, and conducts desk and on-site compliance reviews of sub-recipients. Ms. Milner tracks expenditures of sub-recipients, supports the development of AmeriCorps budgets, and prepares financial reports.

FEDERAL & OTHER GRANT EXPERIENCE - Experience Corps has successfully competed for and been awarded several large federal grants. We have been a recipient of AmeriCorps National Direct funding since 2001 and are the largest national direct grantee of AmeriCorps targeted for adults age 55+. The most recent AmeriCorps grant enabled us to serve an average of 10,000 children each year in 105 urban public schools and neighborhood organizations across 11 high-need communities. Last year, through this grant, 1,056 classrooms were provided assistance from members. The Department of Justice awarded AARP Experience Corps a \$2.7 million grant in 2009 and \$2 million in 2013 to support academic youth mentoring. The current, 2-year grant is enabling 11 sub-recipients to serve over 4,000 high-risk K-3 students, improving academic performance and closing the achievement gap while reducing truancy and high-risk behaviors. We are also a Senior Corps Demonstration Program designee in all of our four branches, and our Chicago branch is a current RSVP recipient (\$224,424/year for three years).

AARP Experience Corps has a very successful track record in securing resources beyond federal funding to support national and local operations. The national office raises approximately \$3.5 million annually through contributions from national foundations, corporations, federal agencies, and individuals. At the local level, our branches and affiliates raise an additional \$12 million combined each year from local funding sources. Taken together, Experience Corps has demonstrated the capacity to raise over \$15 million each year.

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b. Compliance & Accountability - Through its experience with large federal grants, Experience Corps has developed the expertise to manage a breadth of member, budget, and program data accurately and efficiently. Proper controls have been developed and systematized throughout the program and accounting departments to avoid duplication of cost allocations and member activities for the various grant programs.

We have developed a continuum of training and technical assistance for our sub-recipients that ensures high standards in the areas of program implementation, budget development and financial management, member supervision, fundraising, and evaluation. Sub-recipients are required to report on their progress to the national office twice a year, we have regular check-in calls with key staff members, and we complete an annual desk review or on-site visit for every sub-recipient. We have developed policies and procedures that dictate how internal site and desk monitoring visits are conducted. The policy includes a risk assessment tool that is used to identify high risk programs that may need additional technical assistance and monitoring throughout the year. When non-compliance is detected, consequences can include special conditions on future sub-grants, reduced funding and/or slots, having to pay back funds to CNCS, and the creation and monitoring of a corrective action plan. The prevention, detection, and enforcement of the rules, regulations, and program deliverables is overseen by the grants management team at the national office, which is composed of finance, program, and development staff.

Special attention is given to ensuring that all staff members and sub-recipients understand the prohibited activities. Although many of our AmeriCorps members return from year to year, we ensure that there is training in every pre-service orientation dedicated to prohibited activities. As a part of the site monitoring visits outlined in our policies and procedures, the national office interviews AmeriCorps members to ensure that they are being trained appropriately on the prohibited activities. During the interviews, we also ensure that all of their service activities are listed in their position description.

Experience Corps received high marks from the AmeriCorps Senior Grants Officer in the last monitoring report. The auditor commented, "Individuals responsible for the use of federal grant funds were knowledgeable regarding the organization's systems ... and exhibited a sincere concern for compliance with federal grant requirements. The organization has a high, appropriate level of

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involvement with the sub-recipients including oversight and monitoring. Sub-awardee training is focused on appropriate risks and compliance."

c. Past Performance - PERFORMANCE MEASURES - In both the 2011-2012 and 2012-2013 grant year, we were able to meet our two outputs (ED 1 and ED 2). Our outcome performance measure was ED 5, the number of students who demonstrated improved academic performance. In 2011-2012, 70% of the students for whom we received test scores, demonstrated adequate improvement, and in 2012-2013, 77% of the students demonstrated improvement. Essentially, over two years, our AmeriCorps members helped 2,966 students demonstrate improved academic performance. With that said, we were not able to collect test data from enough students to have met our performance measure. (ED 5 requires us to report a number of students, rather than the percent that improved.) We have addressed the challenge of data collection by: (1) requiring all sites to have MOUs with the school or district that states that the entity will be able to provide standardized test data; (2) no longer serving in schools that are unable to provide data; (3) and requiring sub-recipients to report their data collection methodology for the 2014-2015 school year, so that we, as the primary grantee, know that they all have access to the data. With these changes, we believe that we will be able to meet both our outputs and outcomes in each of the next three grant years.

ENROLLMENT - In the 2013-2014 grant year, we have a combined 100% fill rate of our QT and MT slots. This is a 3.5 percentage point increase from our 96.5% fill rate in 2012-2013. We look forward to continue having a 100% fill rate, as we have adjusted the slots in this application to reflect the number of slots that each site has historically been able to fill.

RETENTION - Retention can be a challenge with older adults; as people age, it becomes more difficult to recover from health setbacks and manage caregiver and other responsibilities. In response, our sub-recipients incorporate wellness activities for members and provide a supportive network of team members. For example, our Boston site piloted a series of health and wellness workshops and trainings in 2009-10, called The Healthy Aging Initiative. The initiative was created in direct response to the Washington University evaluation, which showed that Experience Corps volunteers experience dramatic improvement in mental and physical health and report a statistically significant decrease in functional limitations. These strong health benefits are another key reason why volunteers enjoy serving with us year after year.

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While we cannot control some of the circumstances that lead to members being exited before they complete 300 hours, we have developed guidelines and systems to ensure that the number of members exited early are reduced. For example, we do not allow sites to enroll members after December to ensure that the members have adequate time to complete their service hours. Sites continue to communicate the importance of the commitment of 300 hours to all new members. To this end, we are piloting an electronic timesheet system this year that allows members to see how many hours they need to complete each week in order to complete their term of service on time. AARP Experience Corps' current retention rate is 80%; we expect that as these changes are fully implemented, our retention rate will increase.

d. Continuous Improvement - We consistently seek input from our stakeholders to inform ways we can continuously improve our program and member experience. As fully described in section 2b, we use a variety of surveys to collect feedback from our members, teachers, and network partners to make informed improvements to the program broadly and locally. Current examples of our commitment to continuous improvement include: 1) the development in the summer of 2013 of a Common Core State Standards curriculum and quick access fact sheets; 2) the 2013-14 piloting of an electronic survey for members and staff to improve data collection and reporting; and, 3) the planned 2014 creation of training videos to better support members' pre-service training experience and test the efficacy of online training as a supplement to face-to-face training.

Cost Effectiveness and Budget Adequacy

a. Cost Effectiveness - AARP Experience Corps will further improve its cost effectiveness as an AmeriCorps grantee in 2014. Our request to the Corporation is \$1,664,173 and we will provide more than a 50% match totaling \$1,800,208. By requesting fewer quarter time slots and drastically more minimum time slots, Experience Corps will increase the number of members engaged in National Service and the number of students served, while decreasing the number of MSY we are requesting, thus reducing the cost of our AmeriCorps program to CNCS. With at least 350,000 hours of service projected to be provided by AmeriCorps members and leveraged volunteers, this translates into \$4.75/service hour covered by federal funds. This represents a highly cost effective approach to provide a proven literacy intervention to thousands of high-need students.

In addition to requesting fewer MSY and providing more support to students through AmeriCorps

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members, Experience Corps is decreasing reliance on Corporation funds by reducing the cost per MSY by 2% compared to our previous level of support. We are dedicated to continued sustainable growth at the local and national levels, focused not only on continuing federal funding, but also on increasing the number of supportive relationships we have with private entities such as AARP and Target Foundation.

As we increase the number of AmeriCorps members in our network, we are also expanding our reach to new communities and schools in some sites. For example, our program in Washington, DC is exploring expansion into Prince Georges County and the City of Alexandria; and our program in Philadelphia is looking to expand into outer counties as well.

With the passing of the Serve America Act, our program has also become more cost effective. Because our members are 50 or older, many of our AmeriCorps members return to the same school for multiple years. Twenty-seven percent of our AmeriCorps members (151) who became a member in 2011 served in all three AmeriCorps grant years; 44 former AmeriCorps members are currently serving as team leaders at two of our largest sites, representing 97% of on-the-ground leadership. Overall, 57% of Experience Corps' members have been with the program for three or more years. This member return rate increases the return on our investment in our volunteers who are the most valuable part of our program.

b. Budget Adequacy - Experience Corps is supported by; our parent organization, AARP; program income from school districts; national private foundations including Target, the Annie E. Casey Foundation, Deerbrook Charitable Trust, Pew Charitable Trust, DC Promise Neighborhoods Initiative, Open Society Institute; Department of Justice and state governments; and individual donors. Our national development team is working to raise additional funds from a number of other national foundations and corporations and is building a more robust individual donor program.

Our sub-recipients each have secured a diverse array of non-federal funds, both in-cash and in-kind. For example, in the Bay Area, our sub-recipient has secured \$110,000 from one LEA and substantial grants from local foundations. Our Baltimore City branch has been successful in securing a number of private foundation grants in addition to negotiating funding contracts with each of the 19 AmeriCorps schools it serves, totaling \$430,000 in school fees.

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At both the national and local level, the most significant program cost is staffing. We ensure that local staffing is sufficient for both direct support for member activities and support for maintaining member records and other auditable documents. At the national level, staffing ensures: monitoring and evaluation of outcomes at the local level; training and technical assistance in program implementation; evaluation; financial management; and member support. It also allows the national office to provide sub-recipients with marketing and communications support.

Evaluation Summary or Plan

AARP Experience Corps has expanded and evolved since the Washington University and Johns Hopkins University studies described in section 2b (Evidence-Base) were conducted. We therefore plan to expand our evaluation efforts to look more holistically at the Experience Corps model of today and refresh our external research base to make informed programmatic decisions. From 2014 to 2018, we plan to embark on implementation and impact studies that build on the findings of the previous external research and answer new research questions that have emerged as Experience Corps has expanded and matured.

The goal of the implementation evaluation is to better understand what implementation on the ground looks like for our three implementation models (one-on-one, small group and classroom assistance) and the key internal and external factors that influence how each is implemented. By having an in depth understanding of how our program is implemented across our sites, we can hone our program delivery across the entire network. The evaluation will use a combination of program data review, site director surveys, site director and teacher/principal interviews, and cross site analysis.

The overarching goal of our impact study, slated to begin in 2015, is to understand which of our three models, or which combination of models, lead to the greatest impact for struggling readers in K-3. Previous external research has focused on a one-on-one or classroom assistance model, and has not looked at the small group model or included our work with kindergarten students. We anticipate seeing significant impact of all three models on student achievement, however, the impact evaluation will help ascertain if one has a larger effect than another. The evaluation will use experimental or quasi experimental design (random assignment treatment and control group and or school/classroom matching), collection of reading assessment data and classroom engagement (behavior) data on both groups, teacher surveys, and a quantitative analysis (descriptive statistics and regression analysis).

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Amendment Justification

N/A

Clarification Summary

1. (a) Please see 2012 990.

(b) AARP Experience Corps is establishing a strong donor base (see 2012 990) and has a robust pipeline of prospective foundation and corporate donors. Our current list of secured donors (*), strongly anticipated donors (**), and risk-adjusted prospects includes:

AARP*

Deerbrook Charitable Trust*

Ringer Foundation*

RR Donnelley**

Johns Hopkins University**

Kind Family Foundation**

Philadelphia Public Schools*

Philadelphia Charter Schools*

Baltimore Public Schools*

Chicago Public Schools*

Washington DC Public Schools*

MetLife Foundation

My Brother's Keeper

Annie E. Casey Foundation

Experience Corps initiated a field fundraising strategy in 2013, employing development officers in our Chicago, DC and Philadelphia branches. This approach is significantly growing our prospect pipeline in local markets and bolstering our major gifts efforts. We are in the process of establishing a national leadership council, as well as local leadership councils in each of our four branches, comprised of well-connected, high-net-worth individuals, to cultivate their peers with a focus on securing gifts of \$10,000 and up. Leadership council chair candidates are being actively recruited this year and we anticipate the councils becoming operational in late 2014 or early 2015.

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Experience Corps also engaged a high-caliber, strategic planning firm in December 2013 to develop a transformational growth plan for EC to include a new financial model and investment prospectus. The full plan will be delivered in June 2014.

Finally, AARP Foundation serves as the central development function for the entire AARP enterprise and is committed to raising support for AARP Experience Corps.

2. (c) Program staff for our three branches are accounted for directly in the budget. Program staff for the five sub-grantees are captured in the "Other program operating costs" section.

2. (a, b, d, e, f) Addressed in budget

3. (a) The average age of an AARP Experience Corps AmeriCorps member is about 65, with 163 members over 70. We recruit at senior centers, community centers, and local churches. We do not target individuals with disabilities during recruiting. However, each of our sites does have a non-discrimination policy and provides reasonable accommodations when appropriate.

(b) N/A

4. N/A

5. N/A

Continuation Changes

N/A

Grant Characteristics