

Narratives

Executive Summary

True to their pioneering spirit of the 1960s and 70s, national studies show that more than 70% of baby boomers are still hungry to make a difference in the world. In Maricopa County, that translates to approximately 700,000 boomers -- many of whom are or will soon be seeking meaningful service opportunities in local social purpose organizations. What they often find, however, is a gap between the type of opportunities they seek and available service opportunities. Experience Matters, recognizing the documented positive relationship between well-being and volunteering, works strategically to enhance organizational capacity to recruit, engage, and retain this generation of volunteers. Working with national civic engagement organizations such as Encore.Org and the Intergenerational Center at Temple University, Experience Matters is at the forefront in a national movement to transform models of civic engagement and healthy aging. In just four years, we have served over 1500 individuals and more than 200 social purpose organizations through a best practice platform model that connects passionate skilled adults aged 50+ with community organizations. In addition to programs and workshops that assist adults with exploring their interests, values and skills, we also help organizations develop best-practice volunteer engagement models and practices that increase their capacity for recruiting, training, and retaining of older adults. Our programs offer the variety and flexibility that Boomers have told us they need in term of structure (schedule, commitment, experience level, continued income) and purpose (interest area, connections, outcomes) in order to use their experience effectively and to address specific community needs. Experience Matters views national service as a powerful pathway for Boomer adults to engage in and strengthen our community while helping them shift to social service endeavors and positively impact the community. For the proposed Experience Matters Senior Corps RSVP, we intend to engage a minimum of 190 volunteers age 55+ in the following service activities: school-based literacy tutoring; school-based mentoring; distribution of benefits information; and food delivery. Our primary focus area is Education (K-12 Success). At the end of the three-year grant, at least 90% of the students who complete the school-based literacy tutoring will show improvement in academic performance and 60% will achieve grade level benchmarks in their reading scores. The CNCS federal investment of \$95,034 per year will be supplemented by \$10,453 in year one; \$22,808 in year two; and \$37,063 in year three.

Strengthening Communities

Primary Focus Area -- Education [K-12 Success] Community Need: The need for youth tutoring and

Narratives

mentoring is documented by data showing that education achievement in Arizona, when compared to other states, is below average. According to 2008-09 data from the National Center for Education Statistics, Arizona's dropout rate of 8.3% is nearly the highest in the nation -- double the national rate of 4.1%. The Arizona Department of Education 2011-2012 State Report Card showed a graduation rate of 78%. For African American, Hispanic, and Native American children and those who live in poverty, educational outcomes are even worse. Nationally, African American and Hispanics are two times more likely to drop out than their white peers. The drop-out rate of low income youth is about 5 times greater than peers from high income families. In Arizona, 26% of African Americans, 28% of Hispanics, and 38% of Native Americans failed to graduate compared to 15% of Whites Only. The drop-out rate of economically disadvantaged children was 27%. A recent study of disconnected youth -- young adults age 16-24 who are neither working nor attending schools -- conducted by the nonprofit Measure of America ranked Metropolitan Phoenix top among 25 major metropolitan cities nationally. In metro Phoenix, one in five young adult is disconnected versus the national average of one in seven. (The Arizona Republic, August 22, 2013). Furthermore, Arizona is below national average in math, reading, science, and writing at the fourth and eighth grade levels (National Center for Education Statistics, 2011). The 2011-2012 State Report Card shows an average of 79% of 3rd through 8th grade students passing the state mandated AIMS reading test and 65% passing the AIMS math test. Similar to graduation rates, the percent of Blacks, Hispanics, Native Americans, and economically disadvantaged passing the AIMS math and reading tests was much lower than their higher income white peers. These low rates are highly problematic given Arizona's quest for economic growth and goal of becoming a national leader in the biosciences and technology fields. Clearly there is a pressing need to improve educational outcomes for Arizona students, especially the large number of at-risk children. Recognizing that a child's ability to demonstrate reading proficiency at the end of the third grade is a key indicator of future academic achievement, high school graduation, and vocational success, the Arizona legislature passed Move On When Reading (ARS-15-701) which beginning in the 2013-2014 school year requires schools to retain third grade students who attain a "Falls Far Below" designation, the lowest reading level on the AIMS test. Noting that one in five students fails to demonstrate reading proficiency at the end of third grade, local community leaders established Read On Arizona -- a statewide public/private partnership committed to a collaborative approach to improving language and literacy outcome for Arizona's children from birth to age eight. The long term goal is to increase the percent of children reading at or above 3rd grade level to 100%. As a collaborative partner in Read On Arizona, Experience Matters is committed to assuming a

Narratives

leading role in achieving this goal.

K-12 Success: Tutoring -- Public Schools (ED2): Working through our well-established best-practice outreach and placement model, we intend to recruit, train, and manage volunteer literacy tutors (age 55+) for grades K-3 in Title I schools in the RSVP Geographic Service Areas of Avondale, Buckeye, Phoenix, and Tolleson. Here is the COMMUNITY DATA PROFILE for our targeted areas. Avondale -- 23.2% ages 5-19; 8 Title I Schools; 17.1% families w/children under 18 living in poverty; 68% passing 2013 AIMS Reading; 9.4% ages 55-69; 11.1% Veterans. Buckeye -- 23.6% ages 5-19; 6 Title I Schools; 17.1% families w/children under 18 living in poverty; 72% passing 2013 AIMS Reading; 13.7% ages 55-69; 10.3% Veterans. Phoenix -- 22.4% ages 5-19; 40 Title I Schools; 23% families w/children under 18 living in poverty; 64% passing 2013 AIMS Reading; 12.9% ages 55-69; 7.9% Veterans. Tolleson -- 32.5% ages 5-19; 4 Title I Schools; 25.8% families w/children under 18 living in poverty; 60% passing 2013 AIMS Reading; 15.9% ages 55-69; 6.7% Veterans. (Source: 2007-2011 American Community Survey 5-Year Estimates; Arizona Republic Media Services) As indicated in the Community Data, school age children comprise more than one fifth of these community populations -- one third in Tolleson. The majority of students in the select communities are Black, Hispanic, Native American, Asian, and other. Poverty rates of families with children under 18 years range from 17% to 25% with a co-related high percentage of children eligible for free or reduced lunches. Of third graders taking the 2013 AIMS reading test, only 60% passed in Avondale; 72% in Buckeye; 64% in Phoenix; and 60% in Tolleson. Without intensive intervention and re-medial help, a large number of students in these schools will not be promoted with their peers. Administrators and language arts teachers, facing unprecedented pressure to achieve better results with fewer resources, are challenged to provide the remedial instruction these children need. Experience Matters through its current AmeriCorps State program, Boomers Serving Arizona Schools (BSAS) program has already established solid relationships with multiple districts in Maricopa County and in preliminary conversations with school leaders has received enthusiastic support for providing a high quality extra-curricular tutoring program.

Experience Matters will identify schools in the RSVP communities -- Avondale, Buckeye, Phoenix, and Tolleson -- that either have an existing K-3 tutoring program (e.g. the Littleton Elementary School District in Avondale) or are interested in establishing one. We intend to develop a research-based tutoring model and accompanying training protocol which will be deployed at each participating school. We will work closely with pre-existing tutoring programs to insure alignment of their curriculum and training with our Experience Matters model. We project a total of 75 unduplicated

Narratives

trained volunteers at 24 schools (volunteer stations) in the four communities, matched with a corresponding output of 75 K-3 students (ED2). Once tutors are recruited and trained, they will meet with students individually or in small groups two hours per week during the school year for a total of 10,800 service hours (24 weeks @2 hours X 3 years X 75 students). Tutoring services that focus on letter sounds, reading fluency, and reading accuracy will be provided at either the school site or a local after school program site. A minimum of 30% of volunteers (23 total) will be in outcome focused placements with the expectation that 90% of students will show improved reading as measured by the Dynamic Indicators of Basic Early Literacy Skills (DIBELS) -- a standardized set of measures designed to assess and monitor the acquisition of early reading and literacy skills from kindergarten through sixth grade. In addition, we propose that 60% of students will reach grade level proficiency benchmarks as measured by the DIBELS. We anticipate this to be a realistic outcome rate based on a similar AARP sponsored Experience Corps tutoring program in Tempe, AZ where a recent evaluation showed that of the students whose overall reading skills were rated as being below grade level at the beginning of the year, 60 percent were rated as having improved by the end of the year. The DIBELS will be administered by a teacher or administrator at each of the schools at pre and post intervention intervals. Experience Matters plan for collecting, storing, and processing data for this objective is described in the Data Collection Plan/Infrastructure section at the end of this narrative section.

K-12 Success -- School-based Mentoring (ED4A): Working with Phoenix-based schools where we have existing relationships, Experience Matters will identify and recruit agencies and programs that provide school-based mentoring services for 5th through 12th grade youths. One promising example is New Pathways for Youth (NPY) which has two signature programs: Exceed, a school-based program for high school students, which recruits mentors to help teens focus on a goal of graduating high school; and Quest Scholars, in which mentors work long term with high achieving 5th grade students in Title I schools to support them through high school graduation and the college application process.

Community Need: Factors that place children at risk include being disconnected from school or work, lags in academic achievement, lack of positive role models, involvement in the justice system, and transitioning out of foster care. As reported above, Phoenix leads the nation in a recent study of youth classified as disconnected -- that is they are neither attending school or employed. That ranking is not surprising given that school age children comprise more than 20% of the Phoenix community; nearly one in four of their families are in poverty; and 47.6% of the population is Hispanic/Latino (40%), Black (6%), and Native American (1.6%). These minority groups comprise more than 50% of

Narratives

Maricopa County youth referred to juvenile court as shown in a recent Arizona's Juvenile Court Counts FY11 report. The need is further documented with evidence of poor performance by students in the Phoenix community on the 3rd grade AIMS reading and math tests, 64 and 53 respectively. A structured mentoring program, which pairs a caring and supportive adult with an at-risk youth, has proven effective in facilitating healthy social, emotional, cognitive and behavioral development. Partnering with the identified agencies and schools, Experience Matters will provide placements for a minimum of 50 unduplicated RSVP volunteers in 5 volunteer stations in the Greater Phoenix area. Experience Matters mentors will include those adults already affiliated with existing programs who meet RSVP eligibility criteria as well as new recruits from the Greater Phoenix community. Once trained and matched with a student or group of students, mentors commit to meet with youth for at least one hour per week for 6 months (24 weeks) for a 3 year total of 3600 service hours. Mentors, who are strongly encouraged to remain with their youth through the entire calendar year and until graduation, will provide positive adult interaction and support in skill areas critical to their overall academic success (i.e. homework completion, study skills, social skills, etc.). Follow-up studies of mentoring programs show that participants report improved/maintained grades and decision making skills as well as increased trust in adults. Data will be tracked to determine the total number of youth/mentor matches that are sustained for the entire 24 hours. Experience Matters plan for collecting, storing, and processing data for this objective is described in the Data Collection Plan/Infrastructure section at the end of this narrative section.

Secondary Focus Area -- Healthy Futures: In this focus area, EM plans to recruit a minimum of 65 RSVP volunteers to address the following two Healthy Futures objectives: Access to Care -- Distributing Information (H2); and Aging in Place -- Food Delivery (H8). The rationale for targeting these objectives is twofold: a demonstrated need in the geographic service area as well as a means to minimize disruption of RSVP volunteers already providing these services through the currently funded CNCS Senior Corps RSVP Service Sponsor. Communities to be served include Cave Creek, Fountain Hills, Gila Bend, Glendale, New River, Peoria, Phoenix, Scottsdale, Sun City, Sun City West, and Wickenburg. Here is the DEMOGRAPHIC INFORMATION for these communities. Cave Creek -- 13.2% ages 55-69; 3.7% age 70+; 4.2% Poverty All ages; 5.4% Poverty age 65+; 2.1% Receiving SNAP Benefits; 14.3% Veterans. Fountain Hills -- 29.3% ages 55-69; 15.3% age 70+; 5.3% Poverty All ages; 0.7% Poverty age 65+; 2.0% Receiving SNAP Benefits; 13.8% Veterans. Gila Bend -- 16.6% ages 55-69; 7.9% age 70+; 27.7% Poverty All ages; 9.3% Poverty age 65+; 11.0% Receiving SNAP Benefits; 8.7% Veterans. Glendale -- 13.4% ages 55-69; 6.2% age 70+; 17.7% Poverty All ages; 10.0% Poverty

Narratives

age 65+; 15.4% Receiving SNAP Benefits; 10.1% Veterans. New River -- 23.2% ages 55-69; 3.9% age 70+; 9.7% Poverty All ages; 8.1% Poverty age 65+; 4.5% Receiving SNAP Benefits; 11.6% Veterans. Peoria -- 20.7% ages 55-69; 21.7% age 70+; 8.4% Poverty All ages; 7.8% Poverty age 65+; 6.5% Receiving SNAP Benefits; 12.4% Veterans. Phoenix -- 12.9% ages 55-69; 5.7% age 70+; 20.3% Poverty All ages; 11.8% Poverty age 65+; 13.4% Receiving SNAP Benefits; 11.1% Veterans. Scottsdale -- 20.7% ages 55-69; 21.7% age 70+; 7.4% Poverty All ages; 5.6% Poverty age 65+; 3.3% Receiving SNAP Benefits; 10.6% Veterans. Sun City -- 32.7% ages 55-69; 58.9% age 70+; 7.0% Poverty All ages; 6.0% Poverty age 65+; 3.3% Receiving SNAP Benefits; 26.0% Veterans. Sun City West - 13.2% ages 55-69; 3.7% age 70+; 4.2% Poverty All ages; 5.4% Poverty age 65+; 2.1% Receiving SNAP Benefits; 14.3% Veterans. Wickenburg -- 24.9% ages 55-69; 24.4% age 70+; 19.6% Poverty All ages; 5.1% Poverty age 65+; 9.7% Receiving SNAP Benefits; 16.2% Veterans. (Source: 2007-2011 American Community Survey 5-Year Estimates)

Community Need -- Distributing Information: As indicated in the Community Demographic Data, poverty rates of residents in many of these communities, including seniors 55 years and older, are high. Even Cave Creek, Fountain Hills, New River, and Scottsdale -- with higher levels of income -- report pockets of poverty and a corresponding high need for social services. Ten to 15% of families in Gila Bend, Glendale, Phoenix, and Wickenburg report receiving SNAP benefits. According to a 2011 Arizona Health Survey, more than 20% of all Arizonans, including 25% of adults 60 years and older, rated their health as fair or poor. Sixteen percent of all Arizona residents lack private or government health insurance -- one in 6 residents in Maricopa County which encompasses the 13 communities in the RSVP geographic service areas. Nearly 1 in 5 of Arizona residents is currently covered by Arizona Health Care Cost Containment System (AHCCCS), Arizona's Medicaid program that offers health insurance to low-income children and their families and disabled or elderly people. Another 9% of residents are eligible for AHCCCS coverage and yet remain uninsured, often because they are unaware of its availability and/or find the enrollment process too difficult. Conducting outreach and providing information and instruction on navigating the AHCCCS system has proven effective in helping low income residents who meet eligibility criteria attain health insurance. Similar outreach and instruction will be important with the impending Affordable Care Act that in 2014 will require all uninsured Americans to enroll in health coverage on the online insurance marketplaces. In addition, benefits assistance is a valuable service for adults 60 and older faced with the need to enroll in and/or change their enrollment for Medicare and SSSI health care benefits. As shown in the Healthy Futures demographic profile above, adults 55 and older are the majority population in most of the targeted

Narratives

communities. According to a recent Arizona Indicators report, the number of adults in Maricopa County eligible for Medicare benefits increased 5.8% between 2011 and 2012 -- nearly double the percent 3.2% increase between 2010 and 2011. The make-up of many of the communities also skews toward large numbers of veterans -- ranging from a low of 10% in some to a high of 30% (Sun City West). The Area Agency on Aging: District I (AAA), through its RSVP Benefits Assistance Program (BAP) offered at 31 senior centers in the targeted communities, currently use RSVP volunteers to provide objective information about Medicare, related insurance and other benefits to seniors, people with disabilities and caregivers. Volunteers usually give a standard commitment of 4+ hours per week. If funded, Experience Matters will work with AAA to retain as many of its current RSVP BAP counselors as possible. We also intend to explore with the Maricopa County Human Service Department and other social service agencies that provide health insurance benefits information their need for volunteers (e.g. UMOM New Day Centers and Save the Family which provide benefits assistance services for veterans' families). During the 3-year grant period, we project placing a minimum of 25 unduplicated RSVP volunteers in this Healthy Futures focus area. Experience Matters plan for collecting, storing, and processing data for this objective is described in the Data Collection Plan/Infrastructure section at the end of this narrative section.

Community Need -- Food Distribution: In a 2010 AARP report, nearly 90 percent of seniors reported that they want to stay in their own homes and communities as they age. As an increasing number of them choose "aging in place," there is a corresponding increase in the need for home-based meal delivery services. According to the Meals on Wheels Association of American (MOWAA), 93% of seniors surveyed say "meals on wheels" is an important factor allowing them to remain in their own homes. MOWAA further reports that 1 in 7 seniors nationwide is threatened with hunger, a 34% increase since 2007. Recognizing that by 2020 Arizonans age 60+ will make up one-quarter of the state's population and that the 85+ population will increase 141%, the Arizona Department of Economic Security, Division of Aging and Adult Services (DAAS), in its Arizona's Aging 2020 plan, has included the following two goals: a) make it easier for older Arizonans to access an integrated array of state and aging services; and b) increase the ability of older adults to remain active, healthy and living independently in their communities. The personal benefits of "aging in place" include preservation of independence, dignity, the will to live, and ultimately a richer quality of life. In addition, the personal and societal costs for someone to age in their home are much less than living in a care facility. Though no local data on "aging in place" trends or "meals on wheels" services are available, the rationale for providing home services such as meal delivery is based on two factors: the

Narratives

large percentages of adults 55 and over in the targeted RSVP communities -- and expected to increase in the years ahead -- and the one in three of adults 65+ in Maricopa County who report a disability (20% of whom have an ambulatory difficulty). The Area Agency on Aging: District I, through its RSVP program, currently provides "meals on wheels" services to seniors in many of the targeted communities. To insure that seniors continue to receive uninterrupted services and to minimize disruption to the current RSVP program, Experience Matters will incorporate all willing RSVP volunteers and volunteer stations (senior centers) into its program and actively recruit new volunteers. We will also explore opportunities for volunteer placements with other social service agencies which provide home delivered meals (e.g. the Maricopa County Human Services SAIL Case Management Program). For this service activity, we anticipate that a minimum of 40 unduplicated volunteers will provide food delivery services to approximately 450 homebound or older adults across the three year grant period. The data collection plan for this objective as well as those described above is as follows.

Data Collection Plan/Infrastructure: Experience Matters RSVP Project Director will assume responsibility for insuring the consistent collection, maintenance, analysis, reporting, and confidentiality of all required data for the CNCS RSVP project. The RSVP Project Director will also be responsible for developing the data collection tools that provide the required CNCS RSVP program output and outcome measures. All measurement tools and procedures will closely align with those recommended by CNCS (<http://www.nationalserviceresources.org>). These include the following: 1) School-based Tutoring (ED2) -- Pre and Post Test Tracking logs that document each student's DIBELS score prior to tutoring and again at the end of the academic year as well as a Summary Tracking Log that shows pre/post scores and tracks the number of students who have shown improvement in their literacy scores. Supervisors at each service station will be responsible for recording the information for each tutor/student pair and submitting it to the RSVP Project Director at the specified times (i.e. pre and post-service). Supervisors will also fill out a summary Pre-Post Tracking Log which includes the names of all students who completed the required dosage and their pre-post gains scores. The RSVP Project Director will use data from this log to fill out a final Pre/post Test Summary Log that will track the total number of students who improved. 2) School-based Mentoring (ED4) -- A Youth/Mentor Monthly Contact Log to record per volunteer mentor the following: number of hours that the youth and mentor meet, meeting date, location, and type of activities provided. Mentors will keep a monthly contact log for each youth mentored and submit it to their supervisors at the end of each month. A Participation Summary Output tracking form will be

Narratives

developed for each mentor to indicate the total number of contact hours per student and the number of individuals who received the full service dosage of 24 hours.

3) Distributing Health Benefits Information (H2) -- A Volunteer Monthly Tracking Log that records per volunteer the names of all clients to whom information was delivered, the type of activity provided, and the total number of volunteer service hours. 4) Food Delivery (H8) -- a Volunteer Monthly Tracking Log on which each RSVP volunteer records the name of each home-bound client to whom food was delivered, the dates of each delivery, and the total number of volunteer service hours. Volunteers will be asked to submit completed tracking forms to their supervisor on a monthly basis. Supervisors will assume responsibility for insuring that volunteers provide timely data forms that comply with program requirements. Experience Matters will provide training for all supervisors and RSVP volunteers on the importance of and use of the tracking instruments and protocols pertaining to the specific objective they are focused on. Ultimate responsibility for data compliance resides with the RSVP Project Director who will collect and review all required data on a monthly basis. If discrepancies are noted, the RSVP Project Director will provide follow-up coaching for the appropriate site supervisor. The RSVP Project Director will also be responsible for insuring that all data is entered into Form Assembly -- a web-based portal that allows Experience Matters to securely store a rich array of data and produce aggregated reports for analysis and decision making. To assure confidentiality, a password protected account will be set up to store all information collected for the program. Only the RSVP Project Director and Experience Matters staff affiliated with this project will have access to the data. The Experience Matters back office systems are supported and maintained on a Microsoft Exchange server. Storage and backup is supported by Microsoft Cloud operating system technology with an automated back-up. All hard copies of tracking logs and surveys will be stored and locked in fire-proof file cabinets at the Experience Matters office.

Recruitment and Development

Experience Matters' core mission is to help experienced adults age 50+ find meaningful volunteer opportunities with schools and social purpose organizations within Maricopa County. Working with leading civic engagement organizations as Encore.Org and the Intergenerational Center at Temple University, we are at the forefront in the national movement to transform models of civic engagement and healthy aging. In just four years, we have served over 1500 individuals and more than 200 social purpose organizations through a best practice platform model that matches the interests of skilled adults aged 50+ (the supply) with the assessed needs of community organizations (the demand). In addition to programs and workshops that assist adults with exploring their interests,

Narratives

values, and skills (e.g. Explore Your Future and Talent Information Sessions), we also help organizations develop best practice volunteer engagement models and practices that improve their recruitment and retention of older adults (Learning Lab). With nearly 5 years of experience with member recruitment and matching plus host organizational training, Experience Matters has developed a talent database of over 5,000 individuals committed to the concept of Civic Engagement. We will mine this database to identify individuals who demonstrate an interest in school-based tutoring or mentoring as well as assisting with the distribution of health benefits information or home meal delivery to adults. Additional sources of recruitment prospects will be through the following channels: 1) Experience Matters website, 2) bi-monthly Talent Information sessions, 3) local nonprofit email list serves, 4) school partner and organizational e-newsletters and websites, 5) Facebook, LinkedIn and Twitter, 6) neighborhood newsletters, and 7) local entities such as community centers, senior centers, churches, schools and other meeting places. To attract people 55+, materials and activities will feature images and stories that highlight individuals in this age cohort. In addition to a general recruitment plan, a portion of recruitment efforts will be tailored to three specific populations -- veterans, Hispanics and Native Americans (dominant ethnic groups in the targeted communities), and individuals with disabilities. We will reach out to the various organizations that serve these individuals (e.g. Terros and Coalition for Military Families (veterans); Chicanos Por La Causa and Native American Connections; and Arizona Bridge to Independent Living (disabilities)). In a strategic effort to leverage resources and insure success in recruiting tutors and mentors, Experience Matters will use its current AmeriCorps members who are already working as volunteer resource coordinators through its Boomers Serving Arizona Schools (BSAS) program in local school districts. AmeriCorps BSAS members are tasked with helping their respective schools develop best-practice volunteer engagement plans customized to their local school communities and with conducting community outreach. Experience Matters would like to build on this school volunteer initiative by recruiting a cohort of RSVP volunteer leaders who would work with the AmeriCorps BSAS members to implement the volunteer engagement plans, including recruitment, placement, advising, etc. Creating these AmeriCorps BSAS/RSVP dyads would serve a two-fold purpose -- provide an innovative strategy for bringing the community into the schools and create volunteer opportunities for those adults who seek a complex and challenging leadership opportunity. The process of selecting RSVP Volunteers will mirror Experience Matters current best practice placement model which includes a web-based application process, a set of screening protocols, and in-person interviews. Successful candidates must meet minimum requirements, be 55 years or older,

Narratives

have a high school diploma or GED, have a valid driver's license, and be able to make a commitment to complete the term of service. Additional focus will be placed on previous volunteer experience and personal alignment with the mission of the host school or organizations. With the large number of adults 55 years and older in the many of the communities in the RSVP geographic service area, we are confident that a sufficient number of eligible volunteers will be recruited and placed.

All RSVP volunteers will be required to attend Experience Matters' full-day Social Services 101 workshop which is intended to orient them as to Experience Matters' core mission, policies and protocols as well as the RSVP national service program mission and purpose. Experience Matters will develop and walk volunteers through a RSVP Member Handbook which will include program policies, procedures, benefits, and requirements. Before volunteers are placed at their local service station, we will host an additional orientation for them and their school and agency supervisors to meet jointly. During this meeting, school and agency supervisors will have the opportunity to work in small group activities to orient members to their respective community cultures and specific outcome objectives. There will also be Project Specific Training. School-based Tutoring -- An Arizona Department of Education (ADE) reading specialist (who also provides training for the Tempe Experience Corps tutors) will work with Experience Matters to adapt the successful Tempe Experience Corps training curriculum to the RSVP program and provide volunteers with a two-day pre-service training in research-based literacy techniques. Additionally, Experience Matters will offer supplementary coaching and support throughout the year including monthly project check-ins and bi-monthly cohort "community of practice" sessions.

For School-based Mentoring projects the training will be a joint effort of Experience Matters and the partnering agencies with the latter providing training in their respective mentoring curriculums for effective mentoring, and Experience Matters providing the general orientation to its program as well as the RSVP model as described above. Experience Matters will research best-practice school-based mentoring programs and develop a set of criteria which programs must meet in order to participate in the RSVP program. Experience Matters will work with each partnering agency to insure that all training protocols adhere to adult learning best practices and that the RSVP volunteers demonstrate readiness to undertake their respective assignments.

Training for volunteers focused on the Healthy Futures service activities Distributing Information and Food Delivery will also be the joint responsibility of Experience Matters and the partnering agencies. In addition to receiving the general Experience Matters/RSVP orientation, volunteers will participate in program specific trainings provided by the volunteer stations. Experience Matters will work with

Narratives

each partnering agency to insure that all training protocols adhere to adult learning best practices and that the RSVP volunteers demonstrate readiness to undertake their respective assignments.

Volunteers who are responsible for providing benefits assistance through the Area Agency on Aging will receive in addition to the Experience Matters orientation five days of training providing a broad overview of Social Security, Medicare, AHCCCS and Long Term Care. This basic training -- followed by 16 hours of on-the-job training -- is provided by staff from the Arizona Department of Economic Security State Health Insurance Assistance Program (SHIP).

As described above, the RSVP Project Director will schedule bi-monthly cohort meetings specific to volunteers' respective roles (e.g. tutor, mentor, etc.). Cohort meetings are intended to establish informal peer-based learning communities through which participants receive ongoing training, encouragement and support and are provided opportunities for networking, collaboration and incubating new ideas. Cohort meetings will also be used to solicit volunteer feedback relative to implementation issues and make program adjustments as needed. As such it is an effective strategy for promoting volunteer satisfaction and retention. Experience Matters also demonstrates respect for and promotes retention of volunteers through an annual Volunteer Recognition Program and volunteer "Impact Stories" that are featured on the Experience Matters website and in its monthly e-newsletters and promotional materials. Lastly, as part of Experience Matters participatory process, volunteers are requested to complete a satisfaction survey which is intended to surface issues that need to be addressed as well as solutions and ideas for additional training.

Program Management

The RSVP Project Director will be responsible for the day-to-day management of the Experience Matters Senior Corps RSVP program and serve as the main point of contact for the volunteer station supervisors who oversee the individual RSVP volunteers throughout the service year. Supervisors will be required to attend an orientation session that includes an introduction to the program goals and requirements and the mutual responsibilities of Experience Matters as the RSVP Sponsor and the Volunteer Station supervisors. These will be clearly delineated in a written Experience Matters RSVP procedures document as well as a Memorandum of Understanding (MOU) which each supervisor will be required to sign. A partial list of Volunteer Station responsibilities delineated in the MOU includes: provide orientation and in-service instruction to RSVP volunteers; insure volunteers are assigned to service activities that comply with RSVP approved objectives and that assignments are in writing; insure volunteer safety and accommodation for disabilities; enforce anti-discrimination policies; and insure appropriate data collection procedures are followed. Supervisors will be encouraged to meet

Narratives

regularly with their RSVP volunteers to track and re-visit service objectives, also to discuss and address any presenting issues or challenges that may have come up. RSVP station supervisors will be required to sign the MOU; RSVP volunteers at each station will be required to sign a Volunteer Agreement that lists program requirements and responsibilities.

To ensure that volunteer stations are adhering to program responsibilities and RSVP regulations, the RSVP Project Director will establish a Program Tracking form to document adherence to all program requirements and regulations. Items to be tracked for each Volunteer Station include: 100% attendance of volunteers at mandatory orientations and in-service workshops; 100% of volunteers working in activities aligned with approved service activities; adherence to data collection protocols, etc. Supervisors will be asked to complete, sign, and submit the tracking form to the RSVP Project Director at quarterly intervals. In addition, the RSVP Project Director will conduct periodic site visits to review supervisors' responsibilities and discuss any deviations from the required procedures and regulations. If the RSVP Project Director determines that a particular Volunteer Station is continually "out of compliance" and has not corrected the infraction(s) in a timely manner, he/she will consult with Experience Matters leadership team and possibly the Advisory Council to determine the appropriate course of action. This could include removal of the Volunteer Station from our RSVP program. The RSVP Project Director will also be responsible for convening supervisors and facilitating bi-monthly cohort meetings. These will be designed to acknowledge successes; review best practices and program requirements; surface issues and challenges; and promote peer solutions and learning.

Minimizing the disruption to current RSVP Volunteers. The incumbent RSVP Sponsor organization currently serving AZ-01 primary focus area is Healthy Futures, specifically Access to Care and Aging in Place. Services activities include congregate meals, meals-on-wheels, food banks, homebound living programs and a benefits assistance program. In order to minimize disruption of these services, we have developed two work plans that target the communities currently being served with these programs in the specific service activities food delivery (meals-on-wheels program) and information distribution (Benefits Assistance Program). If funded, Experience Matters will work with the incumbent to transition as many current RSVP Volunteers as possible to the Experience Matters RSVP program. We will explore the opportunity to set up Area Agency on Aging as a Volunteer Station to better facilitate the transfer of their current RSVP volunteers in to our program. Experience Matters will continually assess this strategy to ensure community needs are being met while ensuring alignment with our overall program design.

Narratives

Experience Matters has a documented track record in the Primary Focus Area -- Education: K-12 success. Experience Matters, through its current AmeriCorps State grant implemented an innovative program called "Boomers Serving Arizona Schools" (BSAS), which is now in its second year. AmeriCorps BSAS members aged 55+ are placed in Title I schools in the Greater Phoenix area to work with school leadership to create a comprehensive community engagement plan, cultivate business partnerships and recruit committed Boomer volunteers to execute the plan. The goal of the AmeriCorps BSAS is to build the capacity of these schools by increasing student achievement and community engagement as a result of the increased resources, partnerships and volunteers to support the school sites. A second component of the Experience Matters AmeriCorps State grant is recruiting 55+ AmeriCorps members to serve in the nationally recognized, "Your Experience Counts" program. These AmeriCorps members are responsible for addressing the same performance measures as designated in the RSVP program -- that is, ED2: Number of students that complete participation in the CNCS-supported K-12 program and ED5: Number of students with improved academic performance in literacy and/or math.

Since its inception, Experience Matters has engaged an Advisory Board of nonprofit and foundation leaders who are responsible for providing hands-on guidance, feedback, and decision making. To insure that the Advisory Board reflects the diverse population and needs of the communities served, we will assess the current membership to determine its make-up relative to race, ethnicity, age, geography, veteran or disability status, etc. We will then develop and implement an outreach plan to recruit new members to fill any identified gaps.

Experience Matters RSVP volunteers will only be placed in stations that have a signed MOU in place as described on page 20 above. To ensure that all RSVP volunteers are eligible to serve, we will prior to placement require them to provide proof of age (55 or older) and submit to and pass background and fingerprint checks. Experience Matters will establish policies and procedures to ensure that criminal history checks are performed for RSVP volunteer candidates and that it can accommodate volunteer stations that have specific requirements with regard to background checks. The MOU with each volunteer station will address the background/fingerprint check requirements and who is responsible for paying for the checks. The RSVP Project Director will be responsible for ensuring that all other RSVP federal regulations and program guidance from the RSVP Handbook is incorporated in to our program policies and procedures, our orientation and training programs, volunteer agreements and Volunteer Station MOU's.

Organizational Capability

Narratives

Experience Matters is a strategic initiative that began in 2008 under the guidance and sponsorship of the Virginia G. Piper Charitable Trust and Arizona Community Foundation (ACF). By June 2009, with the fiscal oversight and management of ACF, a consortium of members had begun to implement a strategic plan, create an organization, and hire an executive director. Incorporated in 2012 as a 501(c)3 nonprofit, Experience Matters currently offers five core programs and has emerged as a leading best-practice community engagement program focused on mobilizing adults over 50 to solve community problems. As Chief Executive Officer and founding member, Nora Hannah has led Experience Matters through the start up and program implementation phases. Ms. Hannah, with over 20 years in business management and community leadership, leads an experienced and competent staff of 7 full time paid members and 5 part-time paid and oversees all programmatic and financial facets of the organization. Experience Matters' current procedures and infrastructure for insuring effective management and financial accountability of its private and public grants includes a sound financial management system that records separately within its general accounting system the disbursement of grant funds and cost sharing contributions and monitors the expenditure of these funds against the approved budget. Experience Matters also has an established set of internal financial controls that ensures separation of duties, a system of checks and balances, and ongoing supervision of checking accounts and use of credit cards. Experience Matters has a broad base of financial support and a well-established governance structure consisting of a 14 member Board of Directors and an Advisory Council Board who work with the executive team of the organization to provide leadership, stewardship and council. The governing board and the audit committee of the board provide full oversight of the budgets by program, notable variances and financial sustainability of the model. Additionally, the Advisory Council, which is comprised of nonprofit and foundation leaders, provides feedback and insight as to program impact and effectiveness. Lastly, each of our major program areas has an ad hoc steering committee which provides direct staff council on program management, collaboration with related organizations, and ideas for program oversight and improvement. In addition to Service Station MOUs and Volunteer Handbook, Experience Matters will develop an abbreviated staff handbook that describes all rules and regulations, identifies the staff member responsible for each, and describes the process for tracking and enforcing accountability. Staff assigned to the RSVP program includes: Sally Clifford, EM Program Director, who will assume responsibility for oversight of the RSVP program and compliance with all regulatory activities. Ms. Clifford has over 4 years experience in managing CNCS-sponsored programs including AmeriCorps State program grants and AmeriCorps VISTA program. If funded, Experience Matters will hire a full

Narratives

time RSVP Project Director who will be the primary contact with Volunteer Station supervisors and volunteers; oversee implementation of orientations and trainings; oversee day-to-day program operations; and ensure compliance with all program requirements. Program coordination and administration duties for the RSVP Program will be carried out by Kara Caldwell, Program Coordinator.

Experience Matters will ensure compliance with RSVP rules and regulations by working directly with school supervisors. During initial program orientation, supervisors and volunteers will be notified of the full list of prohibited service activities which will be delineated in the Volunteer Handbook.

Volunteers will sign a Volunteer Agreement to ensure that they are aware and in full understanding of the prohibited activities. Supervisors will also be made aware of these prohibited activities and will sign a Service Station Agreement to document compliance. Also, prohibited activities will be taken into account during all stages of the program including design, work plan development, and review of service logs. Experience Matters will have an open door policy which will allow supervisors and RSVP volunteers to contact Experience Matters staff at any time. Experience Matters staff assigned to the program will notify the RSVP Project Director immediately upon noting any compliance issues. All Experience Matters staff responsible for the RSVP program has experience with managing federal grants. Ms. Clifford, Program Director for the RSVP program in her prior position as Executive Vice-President of the Alliance of Arizona Nonprofits managed a 20-member AmeriCorps VISTA program. Serving as a statewide intermediary agency, the Alliance VISTA program was held in high-regard by the CNCS Arizona State Office as a model for "Intermediaries" throughout the country. Ms. Clifford also attended the CNCS-sponsored Grants and Financial Management Institute which is a week long program that covers all aspects of federal grant management, budgeting, OMB rules and regulations, A-133 Audits, and principles/practices of sound grant management. Since joining Experience Matters, Ms. Clifford oversees the AmeriCorps State BSAS program which is now in its second year.

Other

N/A

PNS Amendment (if applicable)

N/A