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Executive Summary

AARP Foundation is a 501(c)3 organization established in 1961 as the charitable affiliate of AARP, the largest social welfare organization serving older Americans in the nation. AARP Foundation works with organizations in communities across the nation to help the growing numbers of older people in crisis every day. Our work involves investing in innovative approaches and connecting struggling Americans who are 50 and older to programs, resources, and benefits to help improve their lives in our four Impact Areas: Hunger, Housing, Income and Isolation. AARP Foundation understands the unique needs of low-income older adults and continues to identify, implement, and bring to national scale interventions to meet those needs. With a presence in all 50 states and Puerto Rico, the Foundation is well-positioned to reach older adults where they live and is able to navigate and impact state and local issues that are either of concern or of value to older adults. During the 2014 tax season, 35,195 Tax-Aide volunteers helped over 2.6 million low- to moderate- income individuals, especially seniors, prepare their taxes at 5,400 locations, in every state, across the country. Through the Drive to End Hunger in a single year, AARP Foundation and our partners served 7.8 million meals through volunteer efforts throughout the country and assisted 15,000 older adults to enroll in SNAP. In addition, the Foundation is one of DOL's largest Senior Community Service Employment Program (SCSEP) national grantees and one of the most successful in placing participants into jobs: since inception, more than 500,000 older people have received services through the Foundation's SCSEP.

Volunteers have been -- and will continue to be -- an essential element in how AARP Foundation and the larger AARP enterprise successfully meet our goals. A vibrant volunteer strategy is an essential component of growing our impact, relevance and revenue. Currently, AARP as an enterprise (which includes AARP Foundation and AARP Experience Corps) oversees more than a dozen volunteer efforts or programs. Nearly 300,000 volunteers work to enhance their communities through a variety of AARP Foundation and other AARP Enterprise efforts (an additional 150,000 work through AARP Chapter Offices). Working alone, in partnership with staff, and in positions supervising other volunteers, these volunteers help move our social mission forward as demonstrated by the following select volunteer initiatives and numbers of volunteers involved in both the Foundation and AARP Enterprise:

- * AARP Foundation Board of Directors: 10
- * AARP Experience Corps: 821
- * AARP Foundation Mentor Up: 65
- * AARP Foundation Consumer Fraud Prevention: 219

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* AARP Legal Counsel for the Elderly: 120

* AARP Foundation Tax-Aide: 35,195

* Driver Safety: 4,614

* Create the Good: 251,390

AARP Foundation proposes to implement a Retired and Senior Volunteer Program (RSVP) in Louisiana (LA5X): E. Baton Rouge, Livingston, Ascension, Tangipahoa, E. Feliciana, St. Helena, and Washington Parishes beginning July 1, 2015. The primary focus area of this project is Healthy Futures. At the end of Year 3, 241 RSVP volunteers will be actively engaged: 174 in our Primary Focus Area of Healthy Futures, and 74 in other community priorities.

The Healthy Futures arena will focus on providing support service, education and/or referrals to alleviate long term hunger. Episodic volunteer opportunities include: meal packing events, meal preparation and delivery, and days of service. Ongoing volunteer opportunities may include: nutrition and SNAP incentive programs and nutrition education. AARP Foundation's RSVP Healthy Futures work will increase the number of older adults gaining increased access to healthy food, with at least 10% of volunteers (25) engaged in work plans that will generate an outcome of beneficiaries reporting increased food security via a survey instrument. In addition, 74 volunteers will address other community needs as identified through information from the former RSVP program and input from the RSVP Advisory Council and community organizations. The CNCS federal investment of \$86,726 will be supplemented by \$11,451 in-kind match from AARP Foundation.

Strengthening Communities

AARP Foundation, a 501(c)3 organization, proposes to implement an RSVP Program in Louisiana (LA5X) beginning July 1, 2015. AARP Foundation's Louisiana RSVP program will recruit, train, and place 248 unduplicated volunteers, 55 and older, by the third year of program operations. AARP Foundation has intentionally chosen a location that (a) will not be renewing its RSVP project but where there is some existing capacity and (b) where AARP Foundation already has well-established SCSEP and Tax-Aide programs providing key local knowledge and partnerships as well as the ability to locate the RSVP Project Directors in the markets we are serving as required by the RSVP NOFA. Building on its evidence-based models and expertise in engaging older adult volunteers through SCSEP and Tax-Aide, AARP Foundation will address activities within the Primary Focus Area of Healthy Futures.

Next year, AARP Foundation will celebrate over 40 years operating SCSEP and Tax-Aide throughout the nation. Tax-Aide, the largest volunteer-run tax assistance program in the nation,

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utilizes over 35,000 volunteers to assist 2.6 million senior taxpayers. In a given year, SCSEP places over 13,000 low income participants in paid training assignments at nonprofit organizations in over 100 communities in 21 states and Puerto Rico. While both programs offer national oversight and, in the case of SCSEP, a local paid project director, all other positions and operations are conducted through trained volunteers and SCSEP participants. Beyond these two federally funded programs, AARP Foundation also engages 10,000 volunteers through our AARP State Offices. AARP Foundation's depth and expertise in building and operating volunteer-based programs and methodically tracking outcomes will be applied to the RSVP program in Louisiana (LA5X). Further, AARP Experience Corps has been operating a successful RSVP project in Chicago and its personnel are available on an ad hoc basis to help develop and grow the AARP Foundation RSVP program.

AARP Foundation's Hunger Impact Area offers a variety of volunteer engagement options, including some short-term/episodic, and some longer-term, ongoing opportunities. For example, since 2011, through the AARP Foundation Drive to End Hunger, volunteers in National Association for Stock Car Auto Racing (NASCAR) markets across the country have participated in food drives and meal packing events to benefit local food banks and hunger relief organizations. The largest of these events was the Charlotte One Million, held in Charlotte, North Carolina in 2012, where the Foundation recruited over 1,000 volunteers, including United Healthcare employees, to help pack one million meals over the course of two days. The AARP Foundation Hunger team is currently working with the Miami Dolphins to plan the September 20th Million Meals event at Sun Life Stadium in Miami. The Dolphins Special Teams is implementing the event where we will engage thousands of volunteers in packing beans and rice meals (raw materials supplied by Outreach, Inc.). The meals will be donated to Feeding South Florida which serves families in four counties: Palm Beach, Miami-Dade, Monroe, and Broward.

Community Description and Needs:

Combined demographics for the 8 counties are as follows:

- * Total Population: 911,551
- * Black or African American: 34.3%
- * Asian: 1.9%
- * Hispanic or Latino: 3.7%
- * White (not Hispanic): 59%
- * Veterans: 48,910
- * % Below Poverty: 19.9%

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Individual county demographics are listed in an attachment.

This region includes most of the "Florida Parishes," more commonly known as the Northshore region. Much of this multi-parish region is rural and agricultural, with the exception of East Baton Rouge parish which includes the Baton Rouge metropolitan area. East Baton Rouge is also the most populous parish in the state of Louisiana. Although the overall poverty rate in Louisiana is 13.3%, six of the eight parishes in this group have higher rates, with two parishes having double the state level. Poverty rates average close to 18% in this region making Healthy Futures objectives critically important.

AARP Foundation SCSEP has extensive relationships with nonprofits in the region including Community Action programs, Goodwill, WIA offices, United Way, and local outreach organizations. Although there are no current RSVP operations in the area, there are significant human service needs, specifically around food insecurity. AARP Foundation RSVP will develop volunteer opportunities with a primary focus on Healthy Futures and work with the community to identify volunteer opportunities to meet other community needs.

How Service Activities Lead to National Performance Measure Outputs or Outcomes:

RSVP volunteers in our primary Healthy Futures focus area will engage in numerous episodic and ongoing activities related to supporting, providing referral and nutritional education for food insecure individuals and families. Outputs will be increased through the use of meal delivery, preparation, and meal packaging while longer term outcomes will be achieved through providing education and support for food insecure beneficiaries to utilize nutrition and SNAP incentives or by beneficiaries participating in nutrition education programs. In addition, our current AARP Foundation SCSEP work in this area includes assignments related to access to food and economic opportunity.

Plan and Infrastructure to Support Data Collection:

AARP Foundation has developed a data collection infrastructure for all of its interventions. This infrastructure allows us to capture the necessary data to measure the effectiveness of our programs. The data management system is a cloud-based application that can be accessed on multiple devices wherever there is an internet connection (including tablets or phones via cellular signal for in the field data collection). The system has the ability for customization to capture program specific metrics. For example, we utilize the program to capture data with regards to our SNAP outreach and engagement activities via tablets and laptop computers. The data provides information about the person being served and the benefit they received. AARP Foundation includes a full-time Monitoring and Evaluation manager who reviews each program and works with project directors to develop an

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evaluation plan, including data collection methodology and measurement such as survey generation and deployment. The evaluation manager also has full access to the data collection system and can run customized reports to meet programmatic evaluation needs.

Recruitment and Development

Plan to Create High Quality Volunteer Assignments:

AARP Foundation has a 50-year history of creating high-quality volunteer opportunities for older adults given that older adults have unparalleled skills and experience to share with others and improve their communities. Our RSVP program will build on this track record and provide volunteers with meaningful, rewarding service, primarily in the Healthy Futures arena, and in other services that meet community needs. We will assess each volunteer's skills, abilities, and interests to ensure that we place them in a volunteer experience that is right for the individual. Our staff will work one-on-one with each volunteer to make sure that they are effectively placed in the community.

In year one, AARP Foundation will establish MOU's with other volunteer stations so that, in year two and beyond, volunteer outreach workers will be able to track, manage, and direct volunteers to service opportunities that meet community needs and well as our Healthy Outcomes priority.

Volunteer Recruitment and Community Diversity:

AARP Foundation's Louisiana RSVP program will follow established procedures for recruitment and screening of volunteers that have proven successful since we began operating volunteer programs. Leveraging the AARP Foundation brand and a variety of communication channels, recruitment efforts will focus on engaging diverse groups of volunteers from the communities to be served. The local RSVP Project Director will develop an annual outreach and recruitment plan using local knowledge from AARP and AARP Foundation colleagues, local partners, and demographic mapping of community residents, organizations, and businesses. Based on the plan, the Project Director will reach out to organizations such as area agencies on aging, senior centers, senior apartment complexes, aging and disability resource centers, veterans' organizations, community action agencies, faith-based organizations, AARP's Louisiana State Office, local AARP Foundation SCSEP office, AARP Foundation Tax-Aide, and others to conduct community outreach utilizing in person presentations, high-quality recruitment materials and online content. Through these efforts, AARP Foundation will recruit a diverse cadre of volunteers that reflect the community we are serving: 59 percent White; 4 percent Latino; 34 percent African American; and 2 percent Asian. We will also make a concerted effort to find RSVP volunteers who served in the program before it was relinquished and will attempt to locate rosters of former RSVP volunteers and invite them back into the program.

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Once a community member has expressed interest in the program and filled out an application, AARP Foundation's Louisiana RSVP staff will conduct a basic eligibility screening. An interest intake survey will be conducted along with 1:1 counseling to identify a meaningful placement for each volunteer that reflects their interests and passions. Potential volunteers are also asked to provide personal or professional references.

Plan to Ensure RSVP Volunteers Receive Training:

Orientation to participants as well as volunteer stations is key to a successful experience with the RSVP. AARP Foundation, through its SCSEP, Tax-Aide, and Drive to End Hunger programs, has established a training protocol for volunteers that effectively prepares them for service in a host of settings including food banks and food delivery, information and referral services, signing individuals up for SNAP programs, financial or tax counseling, or service in other community-based organizations. This protocol ensures a quality experience for volunteers, positive outcomes for beneficiaries, and supports strong volunteer retention.

A Participant & Volunteer Station Handbook will be provided to all participants. Before beginning their volunteer work, each participant receives a thorough orientation by the Project Director (PD). Topics covered in the orientation include orientation to RSVP and national service; AARP's mission and programs; policies, procedures, and paperwork required; basic training in their specific area of service; keeping accurate attendance and time records; and team-building. An Orientation Checklist is completed and maintained in the participant file to document completion of the orientation. Once volunteers have been placed, they receive additional orientation specific to the work they will be performing, a tour of the facility, and an introduction to staff and beneficiaries. In-service training is provided as needed by the host agency, PD, or volunteer team leader.

Demographics of Community and Plan to Recruit a Pool Reflective of its Community:

See above "Volunteer Recruitment and Community Diversity" for detail.

Plan to Retain and Recognize Volunteers:

AARP Foundation's largest and longest running volunteer program, Tax-Aide, operates with over 35,000 volunteers at 5,600 locations throughout the nation. 80-90% of Tax-Aide volunteers return the following season, with the average tenure being 6-7 years. In the most recent survey, 94% of Tax-Aide volunteers are satisfied with volunteering for Tax-Aide (86 % reporting very satisfied). Tax-Aide also has a volunteer engagement rating of 82% based on survey results in the categories of satisfaction, enthusiasm and perception of Tax-Aide volunteer impact in their volunteer role.

We attribute this success to thorough training protocols, engaging volunteers in truly meaningful

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and rewarding work, and communicating to volunteers the level of commitment that is required to participate in the program. AARP Foundation will draw upon these practices to create successful retention and recognition efforts.

AARP Foundation's RSVP program will provide older adults with a supportive network of other volunteers. The benefit of being part of a large group of dedicated volunteers linked to a deeply respected brand is another key reason why volunteers enjoy serving with AARP Foundation year after year. Studies by Johns Hopkins University prove that meaningful volunteerism increases volunteers' mental acuity, decreases depression, and contributes to overall better quality of life for participants.

AARP celebrates its volunteers on an ongoing basis, both formally and informally. Volunteers are recognized throughout their service at one-on-one meetings with staff and group meetings. They receive certificates of appreciation, are featured in articles in publications and online, and are honored at celebrations such as MLK Day of Service and year-end recognition events.

Program Management

With over 40 years of work with SCSEP and Tax-Aide, and the success of the Drive to End Hunger, AARP Foundation has gained considerable experience managing field offices, partnering with community non-profits, engaging volunteers, and tracking budgets and program outcomes. We will bring this vast experience, along with our considerable corporate infrastructure, to ensure the success of our RSVP work.

1. Manage Volunteer Stations in Compliance with RSVP Regulations:

AARP will operate and manage its Louisiana RSVP program in compliance with all CNCS regulations and will ensure that volunteers do not engage in prohibited service activities as outlined in the Code of Federal Regulations, Title 45, Part 2553.91. All RSVP staff will be trained in CNCS regulations and volunteers will receive a written list and discussion of prohibited activities in pre-service training. Each volunteer will sign an agreement that lists the prohibited activities and requires compliance with the rules.

2. Oversight of Volunteer Stations:

AARP Foundation's Louisiana RSVP staff will provide volunteer supervision through a paid full-time Project Director in coordination with staff consisting of volunteers and SCSEP participants. The Project Director and staff ensure that volunteers receive adequate on-site supervision and support, maintain regular contact with personnel at each volunteer station, and ensure that volunteer performance reviews are completed twice a year. At each station, volunteers are led by a Team Leader or host agency site coordinator who provides orientation and site-specific training, oversees timesheet

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completion, answers questions, and serves as a liaison between volunteers and RSVP staff.

Twice per year, we will conduct a performance review for each volunteer. The evaluations provide volunteers with an opportunity to receive feedback about the effectiveness of their service and develop their volunteer skills. Regular in-person or telephone check-ins will allow volunteers to discuss any challenges or problems they are having and to develop plans to address them.

For RSVP, we will use existing volunteer tracking tools utilized by our other volunteer programs. These will include:

- * Volunteer Station Evaluation -- Staff at host stations complete this form at the end of the year. The survey captures the organization's satisfaction with their RSVP volunteer's performance and overall satisfaction with the RSVP program.
- * Volunteer Progress Review -- Volunteers will receive two performance reviews per year, at mid-year and year end.
- * Annual Volunteer Satisfaction Survey -- Volunteers complete a survey at year-end on their satisfaction with the RSVP program, including the amount and content of training and effectiveness of supervision.
- * Activity Logs and Time Sheets -- Volunteers maintain activity logs detailing their service. Activity logs serve as a means for volunteers to record their time spent in each activity and results obtained. Logs are reviewed by staff to ensure service hours and guidelines are being met. Similarly, volunteer timesheets are completed daily and reviewed by Team Leaders and staff.

3. Meet Changing Community Needs and Minimize Disruption to Current Volunteers:

AARP Foundation will contact the former RSVP agency and, to the extent possible, will work with them to share lessons learned, recruit volunteers from the former program, and reach out to former stations that fit within our strategic goals for RSVP. Every attempt will be made to ensure continuity of volunteer placement and interest. We will also engage community leaders and service agencies to track and meet changing community needs.

4. Track Record and Measuring Performance in the Primary Areas:

With each AARP Foundation program, our Monitoring and Evaluation manager creates a specific evaluation methodology and plan, which focuses on identifying the core data points and outputs as well as the instrument necessary (in most cases a custom survey) that are needed to provide the proper measurement of the program outcome. The plan for evaluation implementation also includes timeline, data collection procedures, and the review of data to ensure its validity. The Monitoring and Evaluation manager reviews each of these steps with the Project Director and assists the Project

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Director with the development of the necessary training materials for the volunteers who will be the primary individuals responsible for collecting the necessary data. On a monthly basis, the Project Director generates reports (which are reviewed in consultation with the Monitoring and Evaluation manager) to determine project progress towards the outputs and outcomes. These monthly reports provide an opportunity to make the necessary changes, if necessary, to ensure that the project is meeting its goals. For example, with our SNAP Outreach and engagement project, we utilize the reports to determine the most effective means to reach our target population of low-income 50+ individuals. If we see that one method of outreach is not fully effective (e.g., print advertising), we allocate the resources to areas where the reach is significantly more effective (e.g., radio announcements). Thus, our constant tweaking of SNAP Outreach focuses on maximizing each dollar for the greatest return in order to achieve a highly efficient means of reaching our target population.

5. Ensure Compliance with RSVP Regulations:

RSVP Advisory Council:

AARP Foundation will create a local RSVP Advisory Council to include volunteers and other community members to provide input that will enhance the quality of the program. Their input will assist in developing volunteer outreach, recruitment, training, supervision and recognition efforts, and partnerships with area nonprofits and other host agencies. The RSVP Advisory Council will meet at least three times per year. The Louisiana RSVP program will also seek opportunities to become members of community or aging collaborative groups to better understand community needs and trends.

Volunteers placed in stations with signed MOUs:

AARP Foundation RSVP will ensure that there is a Memorandum of Understanding in place for each volunteer station. The MOU will be prepared and signed by the RSVP sponsor and the volunteer station, identify project requirements, working relationships, and mutual responsibilities. We will not assign RSVP volunteers to stations without a signed MOU.

Volunteers eligible to serve in RSVP:

Interested volunteers are invited to meet, either individually or in a group, with the Project Director. The PD will review required documentation to determine eligibility and then have volunteers complete an application form and assessment of placement interest and relevant skills. Copies of the documents are maintained in the participant file.

Organizational Capability

The Foundation works to win back opportunity for struggling Americans 50+ by being a force for

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change on the most serious issues they face today: housing, hunger, income, and isolation. By coordinating responses to these issues on all four fronts at once, and supporting them with vigorous legal advocacy, the Foundation serves the unique needs of those 50+ while working with local organizations nationwide to reach more people, strengthen communities, work more efficiently and make resources go further. The mission furthers the purpose of the RSVP program.

The Foundation understands the unique needs of low-income older adults and continues to identify, implement and bring to national scale interventions to meet those needs. As one of the largest recipients of DOL's SCSEP and the IRS's Tax-Aide programs, AARP Foundation has long-term, successful experience and knowledge of federal grants administration and compliance both programmatically and fiscally. Systems and controls are well-established to ensure that AARP Foundation adheres to the laws, regulations, and guidelines established for implementing federal programs.

AARP Foundation's programs are backed by significant support and resources that can benefit the RSVP program at both the local and national levels. AARP Foundation's affiliation with AARP and AARP Experience Corps provides potential access to experienced staff, research resources, and established partnerships with business and community leaders. AARP state offices, communication resources, tools, assessments and other resources can potentially be available for both RSVP volunteers and beneficiaries.

Volunteers have been -- and will continue to be -- an essential element in how AARP Foundation successfully meets its goals. Volunteers provide a wide range of work in support of our mission of winning back opportunity for 50+ Americans. Below are some examples of the work AARP Foundation volunteers engage in and the impact of their work:

* Governance of the Foundation: AARP Foundation Board of Directors -- all volunteers -- set the course for AARP Foundation's work.

* Preparing taxes for low to moderate income taxpayers: In 2014, AARP Foundation Tax-Aide helped over 2.6 million people with their taxes, either by completing their federal and state tax returns for free or answering questions related to taxes. More than 35,000 volunteers (majority 50+) including 14,500 in leadership roles serving community through 5,600 sites, leading to more than \$350MM in tax preparation savings.

* Consumer Fraud Protection: 219 volunteers man Fraud Fighter Call Centers - inbound and outbound - to conduct peer counseling to at-risk consumers and warn consumers about current scams. In 2013 the Foundation had direct contact with nearly 200,000 consumers

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- * Drive to End Hunger: Drive to End Hunger volunteers package meals at NASCAR race events as well as in over 6,000 other communities across the country. Nearly 30 million meals have been donated since 2011 and \$21MM raised through corporate partnerships and individual donations.
- * Finances 50+: Trained volunteer facilitators conduct financial training workshops throughout the nation to help seniors budget and protect their finances
- * Teaching Safe Driver Courses: 30,000 courses are taught annually through the AARP Driver Safety program to more than 410,000 participants at 18,000 sites, leading to participants saving \$109,000,000 on auto insurance after completing a course. Additionally, each year volunteers helped AARP reach out to communities in new ways through CarFit and We Need To Talk events.
- * Teaching Reading to K-3 Students: AARP Experience Corps volunteers provide literacy tutoring, and are positive role models, committed to ensuring the academic success of 29,000 students annually.
- * Managing Volunteers: AARP Foundation's Tax-Aide program demonstrates our ability to scale a robust volunteer program with a small number of paid AARP Foundation staff (12) securing large numbers of volunteer leaders (35,000) to serve communities and clients nationally.
- * Staffing Life@50+ Member Event: More than 1,000 volunteers help staff Life@50+ events as greeters, guides and other roles that make the Member Event possible. Event attendees have the opportunity to give back to the event host community through a Day of Service at each Member Event.

Because of this long-term, robust knowledge of volunteer-based programs, AARP Foundation has the capability to start new initiatives and seamlessly transition and deploy participants across numerous volunteer activities. Further, AARP has approved an enterprise-wide Volunteer Technology Modernization effort that will provide significant upgrades to volunteer recruitment, tracking, assessment, training and monitoring. We plan to complete the initial phase in 2015.

1. Programmatic and Fiscal Oversight

AARP Foundation is led by a six-person leadership team, all of whom have made significant impact in their fields. Key senior leadership of the RSVP Project will be the Foundation President, CFO, and SVP of Federal Programs:

LISA MARSH RYERSON, PRESIDENT: Prior to AARP Foundation, Ms. Ryerson served as President of Wells College in Aurora, New York from 1995-2013. Ms. Ryerson led the transition of Wells College to becoming a co-ed institution. During this period, Wells was so successfully repositioned in the marketplace that enrollment increased 45% in just six years. She served as Chair of

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Aurora Inn, Inc., the college's for-profit enterprise whose holdings include the four diamond Aurora Inn and E.B. Morgan House. Ms. Ryerson led the launch of an endowed Center for Business and Entrepreneurship and raised \$17 million to build a state of the art science education facility. In recognition of the outstanding leadership she provided during her 18-year tenure as President, the Wells College Board of Trustees recently named Ms. Ryerson President Emerita.

PATRICIA D. SHANNON, MBA - CFO AND SVP OF STRATEGIC PLANNING: Ms. Shannon leads Foundation efforts to align resources with outcomes that provide the greatest impact for the low-income 50+. Prior to joining AARP Foundation she was the Vice President, Finance & Administration for CEDPA, an international non-profit focusing on women's rights, education and health issues. She was also the Director of Internal Audit at CARE (the world's largest international development and relief organization) where she successfully established and developed the internal audit function serving headquarters and over 40 country offices throughout the developing world.

DEBORAH BRICELAND-BETTS, J.D., SVP FEDERAL GRANTS: Ms. Briceland-Betts oversees AARP Foundation's legacy programs, including Tax-Aide and the Senior Community Service Employment Program (SCSEP). She has been with AARP Foundation for 6 years working to develop Women's Programs, managing the Grandparenting and Benefits Outreach programs and serving for more than a year as Interim Senior Vice President for Programs. She has more than 25 years of program development and management experience in a wide range of nonprofits such as the Older Women's League, American Red Cross and the Urban League. The New York Times in 2001 listed her as one of the most influential activists in aging. The RSVP program will be lodged in her Division.

Fiscal Oversight:

AARP staff directly involved with the project have decades of experience managing federal and private grants and overseeing project compliance. In addition, to our individual staff, AARP Foundation is able to utilize AARP's internal audit and compliance services team. This team has already provided our grants management department with tools to review project compliance and we will be able to leverage their expertise for this project. Direct fiscal oversight will be provided by Corey Hastings, Director of Finance. Mr. Hastings has over 13 years professional experience, with nine of those in the nonprofit sector. He has extensive experience managing federal grant awards, including proposal development, contract negotiation, and financial control for federal grants and contracts with an NIH and USAID implementer respectively. He has completed extensive training in federal grant compliance, project management in a government context, and federal human resources management. He has an MBA from the Mason School of Business at William & Mary and is a

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Virginia licensed CPA.

Day to Day Operations:

The business practices and processes of the Foundation have evolved to include strategies that are highly successful. The following AARP Foundation strategies are simple and have been refined over time: 1) local project directors are well trained, provide outstanding customer service, are compassionate, and live in the areas where they work; they know the stakeholders in the local area; 2) a participant-centered approach that recognizes and utilizes volunteer interests and skills; 3) an experienced leadership team to support a fully trained locally based staff; 4) capacity across the United States that results in a network of peer support and expertise; and 5) an infrastructure of programs and services, which includes AARP, the Foundation, strategic alliances that are local, regional, and national that support collaborative case management.

A key distinctive of AARP Foundation's RSVP project will be providing a National RSVP Project Director at the headquarters office who will assume high level programmatic and regulatory oversight of all funded RSVP projects. This will ensure consistency of reporting, programming, and field staff training and technical assistance. The National Project Director will conduct monitoring visits, be available for telephone technical assistance, and provide kick-off training to awarded RSVP projects. At the field level, all RSVP projects will have a paid Project Director who will be trained by the national office and will report directly to the National RSVP Project Director.

If additional RSVP programs are awarded, AARP will (1) create a national network and build a learning community among its RSVP programs; (2) support RSVP programs to use data effectively to promote program improvement and outcomes measures; (3) assist with identifying sustained funding at the national, state and local levels; and (4) promote the deepening of local partnerships to expand capacity to recruit and serve older adults in their communities.

Compliance with RSVP Statutes and Regulations:

With decades of experience managing tens of millions of Federal dollars annually, AARP Foundation has well-established systems and processes in place to comply with Federal guidelines and requirements. We undergo the necessary audits (A-133) required as a Federal grant recipient and continue to meet their guidelines. Our start-up process will include a review of relevant OMB circulars and RSVP regulations and requirements for field Project Directors. As previously mentioned, Experience Corps, an affiliate of AARP, conducts an RSVP project in Chicago. Their in-house experience and knowledge of this program will be available to national and field staff of this project.

The RSVP National Director will be responsible for training field directors and ensuring that the

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AARP Foundation RSVP project adheres to all RSVP statutes and regulations on an ongoing basis.

Accountability and Efficient use of Resources:

Oversight of federal grant awards is provided by Marc McDonald, Director of Grants Management. Mr. McDonald ensures timely reporting and compliance for nearly \$80 million in government grants received by AARP Foundation. Mr. McDonald was elected to the board of the Grants Managers Network (the largest grant management professional association) in 2014 where he serves on the audit committee. Prior to joining AARP Foundation, he was Director of Grant Policy and System Analysis for the Corporation for Public Broadcasting. He oversaw distribution policy, compliance and grantee reporting for a \$300 million Community Service grant program serving nearly 600 public radio and television grantees. Mr. McDonald holds a BA from Dartmouth College and an MBA from the University of Chicago Booth School of Business.

Staff Positions:

National oversight and direction of our RSVP site(s) will be provided by RSVP National Project Director, David Granholm. With over 10 years' experience at AARP Foundation, Mr. Granholm has worked as a SCSEP Project Director and was Interim Assistant National Director for SCSEP. He is currently managing a multi-state project with AARP Foundation volunteers in our Federal Programs Unit, and has held previous positions in Human Resources and Training. Mr. Granholm holds a Master of Arts in Organizational Behavior and Human Resources. Mr. Granholm will provide day-to-day management of RSVP and ensure compliance with all regulations and statutes.

The local RSVP site will be staffed by one full-time paid Project Director (Job Description attached) assisted by 2-3 Program Assistants who will support day-to-day project administration and volunteer recruitment. Program Assistant roles will be filled by volunteers and SCSEP participants. The Project Director will interface with volunteer stations, promote the RSVP program, represent the program at community gatherings and be responsible for oversight of all data collection and outcomes reporting. The Program Assistants will help with volunteer recruitment and enrollment, volunteer station liaison, and volunteer orientation and training.

Policies and Asset Management:

Through a service provider agreement with AARP, AARP Foundation receives a number of support services, including accounting, capital asset management, human resources, general counsel, procurement, and information technology, from our affiliate, AARP, Inc. The Foundation's fiscal policies and procedures meet generally accepted accounting principles and comply with 2 CFR 215 (OMB Circular- A-110), 2 CFR 230 (OMB Circular A-122), and grant-specific requirements.

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Accounting duties are segregated and written procedures exist to ensure that all procurement of goods and services is budgeted, reasonable, and allowable. A file is established for all procurements and contains justification of the vendor selection, cost-price analysis, and how fair and open competition was considered and obtained, as required. The Foundation has consistently received an unqualified audit opinion on its annual audited financial statements and report in compliance with OMB Circular A-133.

Accounting systems are proven and well-established. The management information system, Peoplesoft 9.2 accounting platform, is used for all financial transactions, procurement, accounts payable, and reporting. The chart of accounts and account string structure can handle multiple funding streams. All grant-funded expenses are coded using an accounting unit that is linked to a specific grant and an account number that corresponds to the cost category and budget line item.

Budgets for each funding source or grant award by grant year are created and monitored. Invoices are scanned and entered into an online invoice tracking and approval system. Costs are allocated to unique accounting units according to an approved cost allocation plan and receive detailed business and compliance reviews. Approved and allocated invoices are uploaded into Peoplesoft for payment processing upon receipt and posting to the general ledger (GL). Accounts receivable are processed upon receipt.

The Foundation has well-established policies for accounting for capital assets. Capitalization thresholds and depreciation periods have been established for various classes of assets, and are in line with industry best practices.

All aspects of human resource operations are governed by well-established and documented policies and procedures.

AARP Foundation's Strategy, Innovation and Risk Management provides guidance and oversight on risk management. Risks are monitored at the Foundation, business unit, and intervention level, and all risks have identified mitigation controls.

Financial and Federal Grant Management:

AARP Foundation has been a recipient of government funding for several decades. In the most recently completed fiscal year (2013) the Foundation received approximately \$75 million dollars from the IRS, Department of Labor, and USDA for our Tax-Aide, SCSEP and SNAP outreach programs. As a result, we have experience managing to specific budgets, coding expenses properly, and being able to report in detail how Federal funds and matching funds are being spent. Financial oversight is provided by the Director of Finance and grant management is provided by the Director of Grants Management

Narratives

(see detailed descriptions above).

Each year AARP Foundation undergoes an A-133 audit. The results of these audits have consistently indicated that our funds have met all necessary Federal grant compliance. Internal audit reviews are conducted annually, with audits selected based on risk, last time audited and materiality, among other criteria. Each year all AARP Foundation employees are required to take a code of conduct and ethics training, which includes a section on lobbying activities so each employee understands our guidelines on the Foundation's prohibition on lobbying activities. In addition, AARP Foundation periodically schedules Federal grant compliance training (most recently completed in February, 2014).

Other

n/a

PNS Amendment (if applicable)

n/a