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Executive Summary

AARP Foundation proposes to have 491 AmeriCorps members who will provide sustained tutoring and classroom literacy assistance in high need communities with large percentages of K-3 students who are below grade level in reading in Baltimore, MD; Bay Area, CA; Boston, MA; Minneapolis/St. Paul, MN; Philadelphia, PA; Portland, OR; and Washington, D.C. At the end of the first program year, the AmeriCorps members will be responsible for tutoring 7,200 students throughout the year (ED 2) and improving the academic performance (ED 5) of 4,320 students. This program will focus on the CNCS focus area(s) of Education. The CNCS investment of \$1,349,565 will be matched with \$1,355,017, \$701,800 of local, state, and federal funds in public funding and \$653,217 of non-government funds in private funding.

Rationale and Approach/Program Design

B.1. Need: Reading proficiency by the end of third grade is a well-studied and widely accepted indicator of success in school and life. Children who cannot read well by fourth grade, generally continue to fall farther and farther behind in their studies. 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.

AARP Foundation Experience Corps' sub-recipients will implement the AmeriCorps program in high-need elementary schools, where the overall student population is predominately minority and low-income and where students show high levels of need for academic support: * Baltimore City - 89% of students in Baltimore schools qualify for free/reduced meals (FARM); 86% of third graders do not meet reading proficiency; 79% of students qualify for Title I services. * Bay Area - an average of 74% (Oakland) and 52% (San Francisco) of third graders are not reading proficient; 76% and 59%,

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respectively, qualify for FARM. Oakland's poverty rate is 19.4% and the unemployment rate for the San Francisco-Oakland statistical area is 6%. * Boston - 62% of our students qualify for FARM; 69% of third graders are not reading proficient; Boston's poverty rate is 19.5%. * Minneapolis/St. Paul - 80% of students qualify for FARM; 70% of third graders are not reading proficient. * Philadelphia - 100% of our students qualify for FARM; 72% of third graders are not reading proficient. * Portland ¿ Between 77% and 90% of students in the ten schools served by Portland, qualify for FARM; between 65% and 92% of third graders in the ten schools served by Portland are not reading proficient.* Washington, DC ¿ Between 71% and 100% of students in schools served by DC qualify for FARM; the percentage of third graders not reading proficient is between 32% and 73%.

B.2. Intervention: Experience Corps is an evidence-based 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 Foundation Experience Corps proposes to engage 491 AmeriCorps members over the age of 50 (91% of our current members are 55 or older) in elementary schools to serve more than 30,000 students over the course of three years. Following Experience Corps' logic model, new AmeriCorps members will receive a combined 25 hours of pre- and in-service training to effectively tutor kindergarten through third grade students in reading. Returning AmeriCorps members receive at least 20 hours of training. Members are assigned to serve as tutors using both our sustained one-on-one or small group and literacy assistance intervention models. Sustained tutoring and literacy assistance tutoring strategies are distinguished by the level of intensity of the intervention and the goal of the tutoring. Sustained tutoring is generally a school-year long engagement between tutors and specific students to address identified skill deficits. Tutors work on specific skills with individuals or groups of students to help them read at grade level. Literacy assistance is a school year-long engagement between a tutor and classroom where the tutor supports the teacher's daily literacy objectives. In this strategy, tutors work with all students in the classroom, but focus on students who might need extra help learning the day's lesson. 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 sustained one-on-one/small group intervention, students will receive a minimum of two, 30 minute tutoring sessions per week, for at least 35 sessions per school year or until the student reaches grade level benchmarks. These students have specific goals they are working toward and are tracked for these literacy outcomes, which will be reported as part of our performance

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metrics. In the literacy assistance intervention, members support the teacher's daily lesson goals by working with small groups, individual students, or an entire class just for that lesson while the teacher works with other students in the classroom. Specific student outcomes are not tracked in literacy assistance, however we collect annual data on teachers' perception of changes in student attitudes and behaviors that result from the presence of the member in the classroom throughout the year. In literacy assistance, the member provides service for an average of 3 days per week for 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 that the student improves academic performance in reading by focusing on the five components of reading (phonemic awareness, phonics, vocabulary, fluency, reading comprehension). Members receive pre-service training in August and September and additional training while actively tutoring in schools from September through May. In addition to improvements in students' reading proficiency (resulting from sustained tutoring only), outcomes of the Experience Corps interventions include improved classroom behavior, teacher satisfaction with the quality of assistance, and increased quality of life for 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 Foundation 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 in the most recently completed year was 80% and our partnership with AARP, which has nearly 38 million members, is leading to growing interest among older adults to join the effort and to introducing Experience Corps in new locations. It is also worth noting that AARP Foundation Experience Corps has been able to recruit a very diverse corps reflective of the communities we serve. Our corps is 50% African American and 43% White, serving a student population that is 56% African American, 21% Latino, and 8% 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

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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 alignment with AARP Foundation 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.

B.3. Theory of Change/Logic Model: Our theory of change posits that by targeting schools in high need communities with large percentages of K-3 students who are below grade level in reading and introducing well-trained adult members who are 50-plus as volunteer literacy tutors to provide sustained and/or classroom assistance tutoring, K-3 students will accelerate their literacy achievement and reach grade level by the end of third grade. At the school level, Experience Corps school site staff and volunteer leaders work closely with school districts, administrators, and teachers to ensure that the right interventions are getting to the right students and classrooms (See logic model diagram for detail).

B.4. Evidence Base: AARP Foundation Experience Corps has established itself as a high-quality tutoring program with strong evidence behind it. In 2009, Washington University in St. Louis, with Mathematica Policy Research, released its evaluation measuring the one-year effect of the AARP Foundation 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

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Clearinghouse evidence standards," and as a "well implemented randomized controlled trial." [3] https://ies.ed.gov/ncee/wwc/Docs/QuickReview/expcorps_020910.pdf 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]

Additionally, our impact on older adult health, social, physical and cognitive-- has been proven in multiple studies conducted by Johns Hopkins University. We continue to refine our model based on evidence in external studies of effective literacy tutoring practices as well as our research on Experience Corps. For example, our implementation evaluation of AmeriCorps grant funded EC sites conducted by Abt Associates (evaluation emailed to CNCS) has allowed us to more clearly understand how sustained tutoring (one on one and small group) and literacy assistance are implemented across AmeriCorps sites, the degree to which these strategies are implemented with fidelity, program strengths, and areas for refinement. The implementation evaluation work is important for us as we prepare for an RCT of our small group sustained and small group plus literacy assistance models as part of our SIF evaluation. Our small group sustained strategy is currently evidence informed and we hope to elevate its level of evidence through the upcoming RCT to a strong level of evidence.

The Experience Corps program uses a variety of indicators and data collection tools for performance monitoring and tracking. We use standardized assessment data to track the academic improvement of students receiving sustained tutoring 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 in both intervention strategies, sustained one-on-one/small group and literacy assistance, the number of tutoring sessions per sustained student, the number of schools engaged, volunteer members recruited, trained and engaged in classrooms, volunteer members retained, and hours members served in classrooms.

B.5. Notice Priority: AARP Foundation Experience Corps is applying for this grant under the Encore Program priority area. According to the 2017 AmeriCorps State and National Mandatory Supplemental Guidance to the AmeriCorps NOFO, an Encore program is a program that engages a

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significant number of participants aged 55 or over. Experience Corps, housed under AARP Foundation, whose mission is to serve vulnerable people 50+ by creating and advancing effective solutions that help them secure the essentials, primarily engages AmeriCorps members who are over 50 to serve in their communities. In fact, this year 516 of our 565 AC State & National AmeriCorps Members are 55 or over. Previous grant years show similar trends with 94% of our AC members in the 2015 program year 55+ and 92%, 55 or over in 2014.

B.6. Member Training: AARP Foundation 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 Common Core aligned training is continuously evolving with recent expansion of our core content to include Social Emotional Learning, and of our delivery model to include e-learning technologies that provide members greater access to resources. Our comprehensive training has led to consistently high performance by our members. In 2015-2016, 92% percent of members were rated as good or excellent in their ability to address students' learning needs; and 95% percent were rated as good or excellent for overall quality of assistance. 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 member 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.

B.7. Member Supervision: All of our AmeriCorps members are supervised by appropriate program staff, who themselves have been through training and have experience working with volunteers.

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While each of our programs is organized differently, all volunteers report to either a Program Manager or Coordinator who are responsible for ensuring proper implementation and compliance of the program. Additionally, there are site coordinators/community engagement specialists who provide direct oversight and management of a cluster of schools. These staff members ensure that AC members are receiving the support they need while serving at the schools, and also act as liaisons between the members and the Program Manager/Coordinator, as well as school staff when needed. Site coordinators are also responsible for data collection and member timekeeping. Some of our programs incorporate volunteer team leaders into their staffing model. These team leaders provide an extra level of support and supervision at the school. These roles are taken on by volunteers who are NOT AmeriCorps members, and want more leadership responsibilities. Often they are veteran volunteers who were formerly AmeriCorps members.

Another aspect of supervision is volunteer performance observations and reviews. Mid-year and end-of-year performance reviews are conducted with each volunteer. These reviews allow program staff to provide effective feedback to volunteers. Through these reviews, volunteers are provided constructive feedback regarding which skills need sharpening or further development. This is also an opportunity for volunteers to discuss any issues or challenges they are having with their students or within the schools. Additionally, site coordinators schedule regular check-in meetings at each school. These check-in conversations provide an additional opportunity for members to share any questions or concerns with site coordinators.

Before starting service in the schools, all members are screened and cleared for participation in the program. Programs ensure that all members have a high school diploma or an equivalent before they are allowed to begin tutoring. Each member goes through a criminal background check, which includes the National Sex Offender Public Registry (NSOPR), State Criminal background check, and FBI background check. During the screening process, members are interviewed by program staff and asked to provide two references.

B.8. Member Experience: Our AmeriCorps members enjoy a very rich volunteer experience while serving in Experience Corps schools as tutors. Members become part of the school culture and family as they spend 10-15 hours a week in their schools with students. This consistent presence allows each volunteer time to work with more students who need individualized attention. Moreover, our

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members are recruited from the communities in which they serve. Our program also incorporates a family engagement component which allows parents and families to meet with the volunteers who are working with their children. These informal meetings usually take place during an event where tutors can socialize with students and their families.

There is a strong mentoring component to our program as well. Our volunteers see the students they are assigned to on a consistent basis for an entire school year. Not only are they building a rapport as a literacy coach and tutor, but they are establishing a relationship with each child based on trust, honesty, and guidance. This mentoring relationship creates the opportunity to form a meaningful relationship with a caring adult, and it has a strong positive impact on our members who become very dedicated to serving in the program and to the students they serve.

Year after year, 70% of Experience Corps tutors, nearly 30% of whom are AmeriCorps members, return to service. This high retention rate is due primarily to their satisfaction with the program and to the opportunities provided for training, on-going professional development and learning throughout their term of service. As mentioned earlier, our volunteers take part in monthly team meetings where they meet, socialize, and contribute to best practice sharing, trainings on various early education, mentoring, and/or child development topics, and discuss successes and challenges they face in the schools. These monthly meetings allow volunteers to spend time together, connecting with their peers, while continuing to learn and improve upon their tutoring skills.

Continual recognition of our volunteers also plays an important role in their experience. Our programs understand the importance of showing appreciation to our AmeriCorps volunteers. Annual recognition events take place at the end of each school year, and volunteers are also recognized throughout the year by program staff during team meetings and other events/parties. Our volunteers have reported that the acknowledgement and gratitude they receive from the teachers, schools, and program staff has a strong impact on their positive experience volunteering as an AmeriCorps member with Experience Corps.

B.9. Commitment to AmeriCorps Identification: AARP Foundation Experience Corps is strongly committed to appropriately identifying its AmeriCorps sites and members. Every AARP Foundation Experience Corps AmeriCorps service location has a prominently placed AmeriCorps banner or sign,

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and all AmeriCorps members wear an AmeriCorps t-shirt, button, or the AmeriCorps logo on their badges every day they serve. In addition, specific pre-service training for all volunteer members reviews what AmeriCorps is and explains how AARP Foundation Experience Corps, AmeriCorps, and they -- as AmeriCorps members -- are part of a larger national service movement.

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

[2] Yung Soo Lee, Nancy Morrow-Howell, Melissa Jonson-Reid, Stacey McCrary. (2010). The Effect of the Experience Corps® Program on Student Reading Outcomes. Education and Urban Society, Vol 44, Issue 1, pp. 97 - 118.

[3] Institute of Education Sciences. (2010). What works clearinghouse intervention report: Experience Corps. Washington, DC: U.S. Department of Education.

[4] Rebok G. W., Carlson M. C., Glass T. A., McGill S., Hill J., Wasik B. A., . (2004). Short-term impact of Experience Corps participation on children and schools: Results from a pilot randomized trial. Journal of Urban Health: Bulletin of the New York Academy of Medicine, 81(1), 79-93.

Organizational Capability

C.1. Organization Background and Staffing: Patricia D. Shannon, CFO and SVP for Strategy, Innovation, Finance, Operations, Technology, and Grants Management of AARP Foundation, has ultimate responsibility for the success of the program. Ms. Shannon has a CPA and holds a BS in Accounting and Economics from the Tobin College of Business at St. John's University and an MBA from the Robinson College of Business at Georgia State University. Over the past 25 years she has held key leadership positions in both national and international for-profit and non-profit organizations.

Marc McDonald, Director of Grants Management will provide primary oversight of the grant. As the Director of Grants Management, Mr. McDonald ensures timely reporting and compliance for over \$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

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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.

Primary fiscal oversight is the direct responsibility of AARP Foundation's Director of Finance, Demetri Antzoulatos. Mr. Antzoulatos brings extensive experience in finance and operations with both national and international public and private sector organizations. His areas of focus at AARP Foundation include forecast and budget development, project management, collaboration with teams on procurement pricing and grants financial management, accounting issue resolution in collaboration with AARP Accounting Services, and program related investing. He holds a B.A. from Gettysburg College and an MBA from the University of South Carolina.

Coordination and provision of all technical support to sub-recipients will be led by Dr. David Handy, Director, Field Services along with Field Services Advisors Christina New-Watling, Peggy Goldberg, and Julie Hecker. The Field Services team will provide daily oversight for the national office support for the program, monitor progress toward the work plan objectives and provide or facilitate all technical support and training.

Program quality and compliance will be overseen by the Education and Evaluation Department. The Education and Evaluation Manager, Susan Siegel, is responsible for the programmatic integrity of the Academic Mentoring Program and for leading a strategy to ensure the consistent application of this evidence-based model across the EC network. Kathy Brennan, the Research and Evaluation Advisor, will be responsible for the evidence base component of the EC program model. Libra Johnson, the Education Strategy Advisor will support the program by making sure mentor training materials align with best practices.

Dave Handy and Susan Siegel report directly to Keanne Henry, Vice President of Experience Corps, Strategy, Planning & Innovation. Ms. Henry oversees the Experience Corps program. Keanne earned a BS in Biochemical Sciences from Harvard and an MS in Biotechnology from Johns Hopkins.

Monitoring and Compliance Manager, Joanna Wald, will play a lead role in the day-to-day

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compliance aspects of the program, ensure deliverables for participating programs, and prepare reports and other communications to CNCS. Performance monitoring and data management will be overseen by Stephanie Okpala, Performance Management Advisor, and Rachel Cannon Frazer, Technology Analyst.

Staff positions described above are reflected in the Organizational Charts emailed to CNCS.

While the national office is well staffed to manage the AARP Foundation Experience Corps program, our most critical partners are our local operating sites which have been implementing the Experience Corps model for over ten years. Each site is fully staffed and includes a local project director who ensures service delivery to each school and oversees recruitment and management specialist, school-based coordinators, and team leaders at schools. Local sites are supported by Experience Corps; national office, which guides organizational growth, creates operational standards, builds a cohesive organizational identity, supports the network of local sites, and shares best practices throughout the network.

Fiscal Accountability: AARP Foundation has been a recipient of government funding for several decades. In the most recently completed fiscal year (2015) the Foundation received over \$80 million dollars from Federal sources including the IRS, Department of Labor, and USDA for our Tax- Aide, SCSEP and SNAP incentive 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 (see detailed descriptions above). Each year AARP Foundation undergoes an audit required by the Uniform Guidance for Grants and Agreements, Subpart F. 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.

C2. Compliance and Accountability: Through its experience with large federal grants, AARP Foundation has developed the expertise to manage a breadth of sub-recipient program and budget data accurately and efficiently. To ensure sub-recipients are prepared to implement a successful and

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compliant program, we have developed a continuum of training, technical assistance, and tools for sub-awardees, including webinars on AmeriCorps rules and regulations, standards for program model fidelity, and standardized data collection systems. These practices ensure high standards in the areas of program implementation, financial management, and program evaluation.

While the training, technical assistance, and tools we provide help prevent compliance issues, we also have sub-recipient monitoring policies and procedures to ensure that instances of non-compliance or program irregularities are detected in a timely fashion. These procedures, which have been updated to reflect the requirements of the Uniform Guidance in 2 CFR 200, dictate how internal site and desk monitoring visits are conducted. The procedures include 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 future funding, a sub-recipient having to pay back funds, or the creation and monitoring of a corrective action plan. The prevention, detection, and enforcement of the rules, regulations, and program deliverables are overseen by the grants management team at the national office.

Sub-awardees are required to report on their progress to the national office twice per year, we have regular check-in calls with key staff members, and we complete an annual risk-based desk or on-site visit for every sub-recipient. All sub-recipients are required to train AmeriCorps members each year on the prohibited activities. In addition to training, the prohibited activities are also included in the member agreement, which is reviewed and signed by each member at the beginning of the year.

Consultation with State Commissions:

In preparation for the 2017-2018 grant year AARP Foundation consulted with the State Commissions of each state in which we plan to operate the AmeriCorps program, including: California, Maryland, Massachusetts, Minnesota, Oregon, Pennsylvania, and Washington, D.C. The consultation process allows us to continue to foster a culture of communication and collaboration between our National Direct program and the State Commissions. We view these partnerships as an essential component to running a high quality AmeriCorps program.

Per the instructions of each State Commission, consultation forms were filled out online or emailed to

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the appropriate office. We anticipate that all state commissions will be supportive of our application. Experience Corps looks forward to continuing the collaborative work between our AmeriCorps National Direct program and the State Commission offices.

Cost Effectiveness and Budget Adequacy

D.1. Cost Effectiveness: AARP Foundation Experience Corps will further improve its cost effectiveness as an AmeriCorps grantee in 2017. In addition to providing a match greater than the required 50%, (our request to the Corporation is \$1,349,565 and the grantee share is 1,355,017), AARP Foundation is maintaining its low cost per MSY at \$12,540 and requesting fewer MSY than in previous grant years. With at least 157,800 hours of service projected to be provided by Experience Corps AmeriCorps members, this translates into \$8.55/service hour for the federal share of the budget. This represents a highly cost effective approach to provide a proven literacy intervention to thousands of high-need students. AARP Foundation is dedicated to continued sustainable growth at the local and national levels, focused not only on relying federal funding, but also on increasing the number of supportive relationships we have with private entities such as AARP and Pew Charitable Trust. Experience Corps is exploring a potential Pay-For-Success partnership with a goal towards diversified program revenue in future years.

Our program has also become more cost effective with the passing of the Serve America Act (SAA). Because of the SAA, members can return to the same school for up-to four year, and many of our members, most of whom are over 65 decide to do so. These returning members are experienced at incorporating school district curriculum into literacy tutoring techniques and are familiar with the Experience Corps Program Standards thereby decreasing the training and onboarding efforts significantly. Additionally, returning members who are no longer eligible to serve under AmeriCorps due to the 4 term limit, continue to serve as team leaders and represent a significant on-the-ground leadership cohort in communities where AmeriCorps members are present. This member return rate increases the return on our investment in our volunteers who are the most valuable part of our program.

D.2. Budget Adequacy: Experience Corps is supported by; program income from school districts; national private foundations including Pew Charitable Trust, the Morris and Gwendolyn Cafritz Foundation, Family League of Baltimore, The William Penn Foundation; 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

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more robust mobile development team and individual donor giving program. Our sub-recipients each have secured a diverse array of non-federal funds, both cash and in-kind.

For example, in Boston, our sub-recipient has secured substantial grants from local donors such as Liberty Mutual, Ludcke Foundation, and Deborah Munroe Noonan Memorial Fund. 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 20 AmeriCorps schools it serves, totaling at least \$337,040 in school fees.

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 to bolster recruitment and retention of AmeriCorps members.

Evaluation Summary or Plan

AARP Foundation Experience Corps has expanded and evolved since the Washington University in St. Louis and Johns Hopkins University studies described in section 2b (Evidence-Base) were conducted. Through the generous support of AmeriCorps in the current round, we were able to conduct an in-depth implementation evaluation of our AC sites which made it possible for us to look more holistically at the current Experience Corps model and refresh our external research base. The evaluation enables us to better understand what implementation on the ground looks like for our implementation strategies (one-on-one and small group sustained tutoring and literacy assistance) and the key internal and external factors that influence how each is implemented. This research has also helped prepare us for an upcoming RCT (2018-19) of our small group and small group plus literacy assistance strategies (funded through the Social Innovation Fund) focusing on the impact of the program on student reading.

In addition to the current evaluation work mentioned above, with this next round of AmeriCorps funding, we intend to conduct an evaluation to better understand the effect of our EC members on student social emotional outcomes (SEL). By more systematically evaluating the effects of the EC

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program on Social Emotional Learning outcomes, we can better understand the link to academic progress and create better training and support for the EC members. Our previous research indicates that the EC model fosters deep relationships between tutors and students. These relationships and the additional personal attention students receive from tutoring are hypothesized to help elementary school students manage emotions, foster other positive relationships with family and friends, and make responsible decisions. Measuring the social emotional learning of Experience Corps students provides a more robust measure of the true effect of the EC program. If funded we hope to work with our current AC evaluation partner, Abt Associates to develop a pre/post test design evaluation of SEL. We anticipate the four primary research and evaluation activities will include: 1) updating and refining the existing EC teacher surveys to include robust measure of SEL 2) administering and analyzing pre-post teacher surveys, 3) providing technical assistance to selected AC sites on evaluation activities, and 4) producing a draft report on findings. We hope to implement this work in the 2017-18 school year in all or a subset of our AmeriCorps sites, depending on school/program interest and funding levels.

Amendment Justification

N/A

Clarification Summary

RESOLUTION ITEMS:

1. All AmeriCorps members are trained in and deliver a literacy and reading curriculum. Curricula are provided either by the school district or the local subgrantee site in collaboration with the participating school district.
2. See responses in #3.
3. AmeriCorps members account for about 30% of all Experience Corps volunteers. AmeriCorps members typically serve more time, participate in AmeriCorps events and AmeriCorps week, and provide the backbone for the Experience Corps program through their dedication and experience. Because AmeriCorps members service responsibilities are the same as other volunteers we used the words, "AmeriCorps members", "volunteers" and "volunteer members" interchangeably throughout this application. We can update this in the application upon request.

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CLARIFICATION ITEMS:

1. Please provide additional details regarding how the program will ensure the activities will prevent and detect members and staff from engaging in prohibited activities (45 CFR § 2520.65) related to advocacy.

Prime and Subgrantee Staff

AARP Foundation and all of its subrecipients take great care to ensure that the CNCS prohibited activities are understood by all staff and that there are controls in place to ensure the prohibited activities are not violated. The prohibited activities are included in each subgrant agreement, referenced in the body of the subgrant and attached in full. Beginning in the 2017-2018 grant year, all staff members on the AmeriCorps budget, both at AARP Foundation and at each branch and sub-recipient, will be required to sign a copy of the prohibited activities, demonstrating that they have read and understand the document. Sub-recipients will not be allowed to spend down on their grant until copies of the signed prohibited activities are received by the Monitor & Compliance Manager. Additionally, at the beginning of every year, AARP Foundation hosts a required training on AmeriCorps. During this training, the prohibited activities are discussed, especially activities that staff and members may encounter in the school environment. Finally, please note that ALL AARP Foundation employees are prohibited from lobbying.

AmeriCorps Members

All AARP Foundation branches and sub-recipients are required to train AmeriCorps members each year on the prohibited activities. In addition to training, the prohibited activities are included in the member agreement, which is reviewed and signed by each member at the beginning of the year. Each AmeriCorps member has an on-site team leader that ensures the Experience Corps program is being executed according to the national standards and the AmeriCorps member's position description. Position descriptions focus on each AmeriCorps member's role as a tutor and do not include any prohibited activities.

2. The past performance assessment identified the following areas for follow-up. Please provide an explanation.

Narratives

(a) Not meeting performance measure outcome targets.

Experience Corps is an evidence-based program that is listed on the Department of Education's What Works Clearinghouse, based on a successful third-party RCT of the model. For the AmeriCorps program, Experience Corps' performance measures are ED2 and ED5. In the 2015-2016 year, we met our target for ED2, but encountered challenges collecting the amount of pre and post standardized test data necessary to meet our outcome target for ED5. Experience Corps already requires all sites to have signed MOUs in place with schools and/or districts that include language requiring the schools to provide student standardized assessment data as a prerequisite to having AmeriCorps members serve at the site. We have found however, that sometimes the MOUs are not enough. The successful collection of data frequently depends on constant communications with the district, principals, and teachers. To address this challenge, Experience Corps will provide on-going technical assistance to sites, in addition to holding mid-year webinars to share best practices for data collection.

Promising Trends

In the 2015-2016 program year, 73.7% of students with pre and post data in the Experience Corps program demonstrated improved academic performance. Experience Corps collected more standardized assessment data in 2015-2016 than ever before. We hope to continue the trend of collecting more student standardized data at each site. While we were just shy of meeting our goal for ED5 in 2015-2016, we increased the number of pre and post test scores that we collected by 187%. Further, the results for ED5 show an increase of almost 3,000 students over the past program year, demonstrating that EC is not only serving more students than ever, but also that students in the program are improving academically at a high rate. We are confident that as we strengthen our relationships with local schools and districts, we will only continue to improve in our data collection and meet our goal for ED5.

(b) Less than 100% Enrollment.

This year our sites filled 568 of our 599 awarded slots for a 94.8% enrollment rate, over a three percent increase from the previous program year. Three of our eight sites achieved a 100% enrollment

Narratives

rate, with the remaining five sites achieving between 86% - 93% enrollment. To ensure we meet our fill rate for our new grant cycle, we have individually assessed each site's enrollment rate history in the current cycle and are applying for only the number of slots that they have filled in the past.

(c) Less than 100% Retention.

Experience Corps's retention rate in 2015-2016 was 80.3%. Although this is a marked improvement from our retention rate last year, it does fall short of AmeriCorps's 100% retention goal. Because the average age of our members is 65 we do find that there are a number of members each year who become seriously ill or need to leave to program to become caregivers of other family members. With that being said, two of our sites struggled with retention last year more so than we would expect, achieving rates under 60%. We required each site to develop a plan to address this issue. Our Washington DC site is tackling the issue by having their recruiter create a surplus pool of potential candidates to fill slots for early exits, in addition to starting volunteer shadowing days to keep potential AmeriCorps members interested in the program while they are awaiting the next scheduled training. The Bay Area is putting a plan in place to improve recruitment at their site by: (1) providing monthly updates for each AmeriCorps member with the total number of hours they have completed to date, (2) identifying members who are not on track to complete their hours by the end of the grant year as early and possible and, (3) providing members with a corrective action plan for getting back on track to complete their hours, as well as, the staff support necessary for success.

(d) Less than 100% compliance with 30-day enrollments and exits.

AARP Foundation's 30 day enrollment rate in 2015-2016 was 99.5% and the 30 day exit compliance was 97.2%. Instances of non-compliance occurred from mis-communications with members or, in the case of exits, a new staff member at the Washington D.C. site who was not properly trained. As a result of these late enrollments, AARP Foundation will be taking a more proactive approach to training new hires. Rather than allowing staff members at local sites to train new staff members in AmeriCorps rules, AARP Foundation Field Services staff will be responsible for alerting the Monitor & Compliance Manager of new staff members being hired at sub-recipient sites, and the Monitor & Compliance Manager will be responsible for providing mid-year training.

Continuation Changes