

Narratives

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 serves vulnerable people 50+ by creating and advancing effective solutions that help them secure the essentials. AARP Foundation works with organizations in communities across the nation to help win back opportunity for older adults.

Our work involves investing in innovative approaches and connecting 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.

AARP Foundation proposes to engage 225 RSVP volunteers in project area CA-14 of which 175 will be placed in outcome based assignments. The primary focus area of this project will be Healthy Futures. Some of the volunteer activities will include food delivery, food pantry support, assisting soup kitchens, and providing tax preparation services. At the end of the three-year grant RSVP volunteers in outcomes based activities will serve a minimum of 1750 unduplicated individuals with 200 documented outcomes and, in the case of VITA, save \$25,000 in tax preparation fees for beneficiaries.

The CNCS federal investment of \$143,080 will be supplemented by an AARP Foundation match of at least 10% in year one of the grant.

Strengthening Communities

AARP Foundation, a 501(c)3 organization, proposes to implement an RSVP Program in Los Angeles County, CA project area CA-14 beginning October 1, 2017. AARP Foundation's RSVP program will recruit, train, and place 225 unduplicated volunteers, 55 and older, by the third year of program operations. The primary focus area of this project is Healthy Futures. In year 3 of this grant, we will engage at least 175 volunteers in outcome based activities.

Theory of Change

Narratives

Building on our evidence-based models and expertise in engaging older adults as the largest SCSEP and Tax-Aide (VITA) providers in the nation, AARP Foundation will address RSVP activities within the primary focus area of Healthy Futures. By engaging volunteers in activities where individuals receive emergency and supplemental nutritious food from food banks, food pantries, or other nonprofit organizations, individuals will report increased food security of themselves and their children (household food security) as a result of CNCS-supported services.

Work Plans

Food insecurity is a widespread and ever-growing problem in Los Angeles County, including those in the area covered under CA-14. Nearly 1.5 million residents in the county experience food insecurity, which means that more than 16% of individuals wonder daily where their next meal will come from. While hunger is a national issue that affects millions from various backgrounds, it has a particularly negative affect on older adults living in CA-14. These individuals face numerous challenges daily, especially those seniors that live on fixed-incomes already struggling to combat the area's soaring housing and transportation costs. The Los Angeles Area Food Bank reports that more than 24,000 of its recipients are individuals 65 and older. Through the RSVP Program, the AARP Foundation hopes to close the gap on this issue by partnering with local food pantries to provide volunteers that will support a range of activities that offer food to hungry older adults and families. Volunteers will engage in Food Bank and Food Pantry support activities including receiving donations, sorting, assisting recipients, and Meals on Wheels and related food delivery activities, including meal delivery, driving, and other support and record-keeping. To collect output data, logs will be maintained at the nonprofits and shared with RSVP to indicate the number of non-duplicated individuals served. Outcome data will be obtained via survey instruments administered in partnership with volunteer stations.

Outputs and Outcomes

AARP Foundation is well-positioned to deliver outputs and outcomes that align with National Performance Measure Requirements given our experience managing CNCS AmeriCorps and RSVP grants. In the primary focus area of Healthy Futures, output H8 (Number of homebound OR older adults and individuals with disabilities receiving food, transportation, or other services that allow them to live independently) and H10 (Number of individuals receiving emergency food from food banks, food pantries, or other nonprofit organizations) are aligned directly with national measures. AARP

Narratives

Foundation will engage RSVP volunteers to serve at least 1750 individuals and document at least 200 positive outcomes.

Recruitment and Development

Plan and Infrastructure to Ensure RSVP Volunteers Receive Training

AARP Foundation has decades of experience creating high-quality volunteer opportunities for older adults understanding that older adults have unparalleled skills and experience to share with others and improve their communities. AARP Foundation successfully engages 50,000 volunteers in enterprise programs such as Experience Corps, Tax Aide and others, including our current RSVP sites. Our RSVP program in Los Angeles County will build on this track record and provide volunteers with meaningful, rewarding service, with a primary focus in Healthy Futures and service activities 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 local staff will work one-on-one with each volunteer to make sure that they are effectively placed in meaningful and needed community service.

Orientation for participants as well as volunteer stations is key to a successful experience as an RSVP volunteer. AARP Foundation, through its other RSVP projects, has established a training protocol for volunteers that effectively prepares them for service in a host of settings including food banks, food delivery, financial and tax counseling, and 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. Topics covered in the orientation include orientation to RSVP and national service; AARP Foundation's mission and programs; RSVP policies and procedures; basic preparation in their specific area of service; and requirements for accurate attendance and time records. 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 station supervisor or RSVP project director. AARP Foundation RSVP will establish MOUs with volunteer stations, along with detailed service activities and expectations, so that our staff will be able to direct volunteers to service opportunities that meet identified community needs and program priorities.

Narratives

Demographics of Community and Plan to Recruit

AARP Foundation's 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 demographical information and knowledge from AARP colleagues, our Advisory Group, other local partners, organizations, and businesses. Based on the plan, the Project Director will reach out to organizations such as area agencies on aging, senior centers, aging and disability resource centers, veterans' organizations, community action agencies, faith-based organizations, AARP's California State 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 RSVP will recruit a diverse cadre of volunteers for our partner stations that reflect the community we are serving: 71% White, (27% White alone, not Hispanic or Latino), 48% Hispanic or Latino, 15% Asian, 9% Black or African American (US Census 2016 estimates).

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 any rosters of former RSVP volunteers and invite them back into the program. Once a community member has expressed interest in the program and filled out an application, AARP Foundation's 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 identification to verify age eligibility.

Plan and Infrastructure 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 (including more than 50 sites in Los Angeles County). 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

Narratives

Tax-Aide volunteers impact in their volunteer role. We attribute this success to thorough training protocols, engaging volunteers in truly meaningful 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 and work with our volunteer stations to create successful retention and recognition efforts.

AARP Foundation's RSVP program will provide older adults with attentive local staff support plus 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 Foundation RSVP will celebrate its volunteers on an ongoing basis, both formally and informally. Volunteers will be recognized throughout their service with thank you notes, at one-on-one meetings with staff as well as in appropriate group settings. They will receive certificates of appreciation, be featured in articles in publications and online, and are honored at special celebrations and year-end recognition events.

Program Management

Plan and Strategy to Manage Volunteer Stations

AARP Foundation understands the unique needs of older adults and continues to identify, implement and bring to national scale interventions to meet those needs. As the nation's largest recipient of DOL's SCSEP and the IRS's VITA (Tax Aide) grant programs, AARP Foundation has long-term, successful experience and knowledge of federal grants administration and compliance both programmatically and fiscally. With CNCS, the foundation has been administering SIF, AmeriCorps and RSVP grants for the past few years and has developed internal expertise to ensure full compliance with RSVP regulations. Systems and controls are well-established to ensure that AARP Foundation adheres to the laws, regulations, and guidelines established for implementing federal programs.

We conduct annual internal compliance audits of all CNCS supported grant programs with foundation staff trained in grants management and compliance. AARP Foundation's programs are backed by significant support and resources that can benefit RSVP projects at both the local and national levels. AARP Foundation's affiliation with AARP provides potential access to experienced staff, research resources, and established partnerships with business and community leaders. AARP

Narratives

State Offices, communication resources, tools, assessments and other resources are potentially available for program management, RSVP volunteers, and beneficiaries.

Plan and Infrastructure to Oversee Volunteer Stations to Ensure that Volunteers are Performing Assigned Activities

We will establish a local RSVP office staffed by a full-time Project Director to manage the local project and support volunteer engagement. Our staff will regularly visit all volunteer stations to provide support to the station supervisors, ensure the collection and review of output and outcome data, review volunteer assignments and ensure that volunteers are performing assigned activities. RSVP staff will regularly review time sheets and station MOUs to ensure volunteer activities are within expectations.

Volunteers have long been 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. Along with managing our RSVP projects, the foundation engages more than 35,000 volunteers (majority 50+) in our Tax Aide, Experience Corps, and other programs. Further, AARP has an enterprise-wide Volunteer Portal software platform that provides significant capability for volunteer recruitment, tracking, reimbursements, and reporting.

Experience and Organizational Track Record in Work Plans

As previously mentioned, AARP Foundation currently has RSVP and AmeriCorps grants and is adept at managing these grants and their work plans to achieve National Performance Measures. AARP Foundation currently sponsors RSVP projects in four states where we have developed work plans that lead to national performance measures. Our longest running RSVP project, in the city of Chicago, developed 5 new outcome-based work plans for PY16-17 as we changed the project's primary focus from Education to Healthy Futures. The project has already surpassed its output target for the program year. Prior to that change, for the PY15-16 program year the project achieved 117.6% of target volunteers in the Education primary focus area. For output measure ED2 the project achieved 243.64% of target and for outcome measure ED5 achieved 332.21% of target.

Organizational Capability

Programmatic and Fiscal Oversight

Key senior leadership of the RSVP Project will be the Foundation President, CFO, Vice President of

Narratives

Grants and External Initiatives, Director of Volunteer and Community Engagement and Director of Finance:

LISA MARSH RYERSON, PRESIDENT: Ms. Ryerson has led AARP Foundation for the past 3 years. During this time the foundation has realized record growth in funding and repositioned itself with a focus on innovation and social entrepreneurship. Prior to AARP Foundation, Ms. Ryerson served as President of Wells College in Aurora, New York from 1995-2013. During this period, Wells was so successfully repositioned in the marketplace that enrollment increased 45% in just six years. 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, CPA, MBA - CFO AND SVP OF STRATEGY, INNOVATION, FINANCE AND GRANTS: 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.

MARC MCDONALD, VP OF GRANTS AND EXTERNAL INITIATIVES:

Mr. McDonald provides oversight, 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.

ERVIN JOHNSON, DIRECTOR OF VOLUNTEER AND COMMUNITY ENGAGEMENT: Mr. Johnson oversees the strategies of how we engage, support and retain volunteers. He supports

Narratives

programs and related systems that are currently using volunteers and develops strategies for increasing the number of volunteers and others in service to low income older adults. Prior to AARP Foundation, Mr. Johnson was with the Association of Medical College where he served as Director of Community Engagement. In that role he led the organization's outreach efforts and developed and supported programs that underscored the connection between AAMC and the local community. Mr. Johnson also served as the Policy Advisor to the Federal Co-Chair at the Appalachian Regional Commission. In this role he was responsible for the development of policy initiatives for the agency and worked to develop public-private partnerships to help improve the health and economic resiliency of the rural communities. He holds a Bachelor's degree in political science from North Carolina State University and a Master's degree in public policy from the University of Chicago.

DEMETRI ANTZOULATOS, DIRECTOR OF FINANCE: Direct fiscal oversight will be provided by Mr. Antzoulatos who has a diverse background with 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 Bachelor of Arts from Gettysburg College and Masters of Business Administration from the University of South Carolina.

Staff Positions: National oversight and direction of our RSVP projects is provided by our RSVP National Manager, David Granholm. With over 12 years' experience at AARP Foundation, Mr. Granholm has worked as a SCSEP Project Director and was Interim Assistant National Director for SCSEP. He has managed a multi-state project with AARP Foundation volunteers and has held previous positions in Human Resources and Training. In his current role managing RSVP, Mr. Granholm provides day-to-day management of RSVP and ensures compliance with all regulations and statutes. Mr. Granholm holds a Master of Arts in Organizational Behavior and Human Relations.

The CA-14 RSVP project site will be staffed by a full-time Project Director with in-depth knowledge of the project area. The PD will be responsible for day-to-day project administration along with station and volunteer recruitment. The Project Director will interface with volunteer stations, promote RSVP,

Narratives

represent the program at community events, and be responsible for oversight of all data collection, outcomes reporting, compliance to program regulations, volunteer recruitment and enrollment, volunteer station liaison, and volunteer orientation and training. AARP Foundation will ensure that the individual selected for this role has the requisite professional skills, program knowledge, and community understanding to ensure success of the program.

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 200 and grant-specific requirements.

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 the 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.

AARP Foundation has well-established policies for accounting for capital assets. Capitalization

Narratives

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 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

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 2 CFR 200 and RSVP regulations and requirements for field Project Directors. The RSVP National Manager will be responsible for training field directors and ensuring that the AARP Foundation RSVP project adheres to all RSVP statutes and regulations on an ongoing basis. AARP Foundation has been a recipient of government funding for several decades. In a recently completed fiscal year 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 VP of Grants and External Initiatives. 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.

Other

The proposed CA-14 project engages 175 RSVP volunteers in outcome-based activities and an additional 50 volunteers in other community priorities for a total of 225 volunteers. With a proposed budget of \$143,080 the cost per unduplicated volunteer is \$635.91 (and \$817.60 per outcome-based volunteer). This compares favorably to the cost per volunteer established by CNCS for RSVP for this

Narratives

funding opportunity (i.e., \$1,250 per volunteer for Year 1 and \$1,000 per volunteer for Years 2 and 3).

With many years 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, including securing required matches. Our Development department has cost-effective and successful processes strategies in place to raise funds for the many AARP Foundation administered programs. Beyond Development, the foundation's headquarters structure includes departments for Grants Management, Finance, Risk Management, Communications, Innovation, Evaluation, and Volunteer Engagement. The foundation enjoys support from AARP with Legal, Human Resources, and IT departments. For purposes of this request, match will largely be provided through AARP Foundation's funding of our RSVP National Manager position; a position that is solely dedicated to ensuring RSVP project success. Additionally, the foundation 100% funds a Director, Volunteer and Community Engagement and Grants Management positions that offer significant support to RSVP projects; salary for this position will be applied to the non-federal match for RSVP possibly in Years 2 and 3.

Additional Clarification - Indirect Costs:

AARP Foundation's indirect cost pool consists of allowable costs incurred by the Foundation's 'Management and General' departments -- ie President's Office, Finance, Strategic Planning, IT, Business Operations. The largest cost types in the indirect cost pool are Salaries and Benefits, Outside Professional Services and Occupancy Costs for the Foundation's National Office.

The occupancy costs included as direct costs ("Facilities" in Other Volunteer Support Costs) in the budget relate to office space in California. These costs are not included in the indirect cost pool.

PNS Amendment (if applicable)

Not applicable.