

Staff Summary Report



Council Meeting Date: 10/16/08

Agenda Item Number: _____

SUBJECT: Request approval of Civic Ventures/AmeriCorps grant to provide the Experience Corps early literacy program in selected Tempe Elementary School District #3 schools.

DOCUMENT NAME: 20081016cskb03 **COMMUNITY SERVICE ADM (0701-01)**

SUPPORTING DOCS: Yes.

COMMENTS: The grant is for \$35,812 for the 2008-09 school year.

PREPARED BY: Kim Bauman, Social Services Supervisor, (Ext. 2462)

REVIEWED BY: Kathy Berzins, Deputy Community Services Manger, (Ext. 5464)

LEGAL REVIEW BY: Judi Morgan, Assistant City Attorney, (Ext. 8779)

DEPT APPROVAL: Tom Canasi, Community Services Department Manager, (Ext. 5305)

FISCAL NOTE: There is no fiscal impact.

RECOMMENDATION: Staff recommends approval of this grant agreement.

ADDITIONAL INFO: The AmeriCorps funds will provide stipends to fifteen adults age 55+ who will provide tutoring to students in kindergarten through third grade in six Tempe Elementary School District #3 schools during the 2008-2009 school year.



**Civic Ventures
Experience Corps/AmeriCorps**

GRANT AGREEMENT

SubGrantee: City of Tempe - Social Services
Experience Corps Project: Experience Corps Tempe
Contact: Kathy Berzins
Address: 3500 South Rural Rd.
Tempe, AZ 85282
Phone: 480-350-5432

Grant Purpose

To further develop the Experience Corps program in Tempe by engaging **15** minimum-time Experience Corps/AmeriCorps Members (the "Members") in a single term of service.

Goals & Deliverables

Funds for this subgrant are provided through a national-direct Corporation for National and Community Service grant to Civic Ventures for purposes of engaging older adults as AmeriCorps members. Work will be guided by the National Outcomes (Exhibit A) as well as local ("SubGrantee") plans and outcomes.

Work under this subgrant must be conducted in accordance with:

- Civic Ventures' proposal to the Corporation for National and Community Service (Exhibit B), SubGrantee's proposal to Civic Ventures, and any approved revisions;
- SubGrantee's final Approved Program Budget (Exhibit C);
- 2008 AmeriCorps Provisions;
- Civic Ventures' Financial Census (Exhibit D); and
- OMB Circulars A-102, A-110, A-122 and A-133 as applicable.

Grant Amount

Up to **\$35,812** over a twelve-month period, as defined by the approved program budget.

Grant Period

September 1, 2008 to August 31, 2009.

Grant Conditions

Continuation of the grant will be contingent upon SubGrantee taking responsibility for, and implementing, all aspects of the Experience Corps/AmeriCorps Program including financial management, program operations, oversight, and data collection. Please refer to SubGrantee Responsibilities in Exhibit E.

Additionally, all SubGrantees must maintain compliance with the terms of the Civic Ventures

Affiliate Agreement signed by the SubGrantee, which has been executed and sent to the SubGrantee under separate cover. Failure to comply with the terms of this agreement may result in suspension or termination of funding. A fully executed and unexpired Affiliate Agreement must be on file with Civic Ventures before any grant payments shall be made.

Grant Funds Requests and Reports

SubGrantee shall receive grant payments by completing and submitting, electronically, an Experience Corps Project Financial (ECPF) Report to Civic Ventures. The ECPF Report should be generated in the format and style as directed by Civic Ventures. Financial information and requests for payment *must be completed* on a monthly basis, and *must be submitted* to Civic Ventures at least quarterly. Failure to complete and submit ECPF Reports on at least a quarterly basis may result in a loss of some or all of the awarded member slots. Please refer to Exhibit G, Report Schedule 2007-2008.

Program Documentation and Reporting Procedures

SubGrantee shall maintain in all AmeriCorps members' files, and make available for review by Civic Ventures, all required Corporation for National and Community Service forms and other required information and documents. Please refer to Member Documentation Checklist in Exhibit F for a current list of documents, subject to change.

A summary of all members' enrollments, transfers, suspensions, exits and monthly time from the program must be submitted for review by Civic Ventures no later than 25 days after the end of each month. The Experience Corps Project Member (ECPM) Report should be generated in format and style as directed by Civic Ventures. SubGrantee is also required to complete an annual progress report. Failure by SubGrantee to complete and submit requested reports, including the ECPM and the annual report, for Civic Ventures' review within the time limit indicated may result in suspension or termination of funding, or other appropriate action. Please refer to Exhibit G, Report Schedule 2008-2009.

Budget Revisions

Please refer to Section IV. M. BUDGET AND PROGRAMMATIC CHANGES of the AmeriCorps Provisions.

Amendments

Any changes to the terms of this Grant Agreement must be made in writing and signed by Civic Ventures.

Termination/Suspension

Civic Ventures may terminate payments to the SubGrantee, revoke the designated member positions, or recover Grant funds from the SubGrantee for failure to comply with the provisions of this Grant Agreement. Civic Ventures may terminate this Agreement immediately upon written notice if AmeriCorps or any other funding source designated for the purpose of this agreement rescinds its support to Civic Ventures.

Publications/Materials

Publications created by the SubGrantee may include an AmeriCorps logo if the publication is consistent with the purposes of the Grant. When communicating in the public domain, SubGrantee must reference Experience Corps and AmeriCorps. SubGrantee is encouraged to reference all other funding sources, as appropriate or required. SubGrantee is responsible for sending two (2) copies of any publication related to this grant, or any materials distributed publicly, to Civic Ventures.

Signatures

The parties have executed this Agreement below to indicate their acceptance of its terms.

For SubGrantee (Project Director/Staff):

For SubGrantee (Board Rep/Officer):

BY: _____

BY: _____

PRINT NAME

PRINT NAME

TITLE

TITLE

ADDRESS

ADDRESS

DATE

DATE

For Civic Ventures:

By: _____

PRINT NAME

TITLE

ADDRESS

DATE

Exhibits Attached:

- Exhibit A – National Outcomes
- Exhibit B – Civic Ventures Proposal to CNCS
- Exhibit C – Approved Program Budget
- Exhibit D – Financial Census
- Exhibit E – Parties' Responsibilities Under the Grant
- Exhibit F – Member Documentation Checklist
- Exhibit G – Report Schedule 2008-2009

2008-2009 AmeriCorps*National Performance Measures

Member Development

Need: Members need skill development to provide effective service.

Activity: Members will serve in teams of 4- 12 at elementary schools and after school programs providing intensive (10-15 hour/week) service as tutors, classroom assistants and mentors. Members will receive pre-service and in-service training appropriate to their role throughout the school year, will have regular team meetings, and will participate in other learning & leadership opportunities.

Intermediate Outcome

Result Statement: All members will receive at least 8 hours of pre-service training and at least 12 additional hours of in-service training.

Target: 95% of members trained as tutors, classroom assistants and mentors will have a “Good” or “Excellent” understanding of basic tutoring and mentoring strategies by the end of the service year.

Instrument: Member Progress Reviews performed by the project director or site supervisor twice (2x) per year.

Performance Measure Statement: All members will receive at least 8 hours of pre-service training and at least 12 additional hours of in-service training. 95% of members trained as tutors, classroom assistants and mentors will have a “Good” or “Excellent” understanding of basic tutoring and mentoring strategies by the end of the service year.

End outcome

Result Statement: Participation in AmeriCorps training and service assignments will provide older members with opportunities to meet new people and increase their social networks while learning new skills. Interaction with youth will also allow members to impart their own life experiences and develop personal relationships with the younger generation.

Target: After a year of service, at least 85% of members will report “satisfied” or higher (3 or higher on a 5 point scale) with the opportunity to learn new skills.

Instrument: Member Survey, once (1x) per year.

Performance Measure Statement: Participation in AmeriCorps training and service assignments will provide older members with opportunities to meet new people and increase their social networks while learning new skills. Interaction with youth will also allow members to impart their own life experiences and develop personal relationships with the younger generation. After a year of service, at least 85% of members will report “satisfied” or higher (3 or higher on a 5 point scale) with the opportunity to learn new skills.

Needs and Service Activities: Academic Support

Need: The personalized attention and skilled support that Experience Corps's AmeriCorps members and volunteers provide for children meet a critical need. The schools we serve face many challenges: overcrowded classrooms, test scores below the state average, failure to meet No Child Left Behind benchmarks, and high levels of poverty. Many first- and second-grade children we tutor are already two years behind in reading development. Early, sustained, individualized attention is a critical resource for young children who lack the literacy skills and the positive attitude toward learning that are the building blocks for school success. Older elementary-age children, and those entering the middle grades, need sustained support for learning to read for meaning across all subject areas. EC members, with guidance from project directors and school staff, apply their pre-service training and their life experience to improve students' performance, their self-confidence as learners, and the school and family supports available to enable their success.

Activity: AmeriCorps members will assist individual students and small groups of students at the direction of a classroom teacher or site supervisor. Activities may include helping students with class assignments, reading to small groups of students, or 1:1 tutoring in specific skill areas of reading, math or other subjects.

Output (1:1 Tutoring)

Result Statement: Members will provide academic support for elementary school students throughout the school year.

Target: 12,000 students will receive academic support.

Instrument: Student intervention logs at service sites; teacher survey twice (2x) a year.

Performance Measure Statement: Members will provide academic support for students throughout the school year. 12,000 students will receive academic support.

Intermediate Outcome (1:1 Tutoring)

Result Statement: Elementary school students will show greater motivation to learn as the result of having an AmeriCorps tutor.

Target: 85%+ of students will have "good" or "excellent" motivation to learn.

Instrument: Teacher survey at least twice (2x) a year.

Performance Measure Statement: Elementary school students will show greater motivation to learn as the result of having an AmeriCorps tutor. 85%+ of students will have "good" or "excellent" motivation to learn.

End Outcome (1:1 Tutoring)

Result Statement: Academic support provided by members will increase students' academic performance.

Target: 85% of tutored students will have "good" or "excellent" attainment of grade level benchmarks.

Instrument: Teacher survey twice (2x) a year.

Performance Measure Statement: Academic support provided by members will increase students' academic performance. 85% of tutored students will have "good" or "excellent" attainment of grade level benchmarks.

Output (Classroom Assistance)

Result Statement: Members will provide classroom assistance to teachers in elementary school classrooms throughout the school year.

Target: 300 teachers will receive classroom assistance support.

Instrument: Teacher survey at least once (1x) per year.

Performance Measure Statement: Members will provide classroom assistance to teachers in elementary school classrooms throughout the school year. 300 teachers will receive classroom assistance support.

Intermediate Outcome (Classroom Assistance)

Result Statement: Teachers will be satisfied with the assistance of AmeriCorps members in their classrooms.

Target: 85%+ of teachers surveyed will report "satisfied" + (3 + on a 5 point scale) with the member's ability to help address student's learning needs.

Instrument: Teacher survey at least once (1x) per year.

Performance Measure Statement: Teachers will be satisfied with the assistance of AmeriCorps members in their classrooms. 85%+ of teachers surveyed will report "satisfied" + (3 + on a 5 point scale) with the member's ability to help address student's learning needs.

End Outcome (Classroom Assistance)

Result Statement: Teachers will have extra time to assist students who are struggling academically.

Target: 85% of teachers will report that the member has a "strong impact" on providing them with extra time to assist students who are struggling academically.

Instrument: Teacher survey at least once (1x) per year.

Performance Measure Statement: Teachers will have extra time to assist students who are struggling academically. 85% of teachers will report that the member has a “strong impact” on providing them with extra time to assist students who are struggling academically.

Needs and Service Activities: Mentoring

Need: The personalized attention and skilled support that Experience Corps's AmeriCorps members and volunteers provide for children meet a critical need. The schools we serve face many challenges: overcrowded classrooms, test scores below the state average, failure to meet No Child Left Behind benchmarks, and high levels of poverty. Many first- and second-grade children we tutor are already two years behind in reading development. Early, sustained, individualized attention is a critical resource for young children who lack the literacy skills and the positive attitude toward learning that are the building blocks for school success. Older elementary-age children, and those entering the middle grades, need sustained support for learning to read for meaning across all subject areas. EC members, with guidance from project directors and school staff, apply their pre-service training and their life experience to improve students' performance, their self-confidence as learners, and the school and family supports available to enable their success.

Activity: At least 75 members will provide 1:1 mentoring or small-group academic enrichment activities during and after school.

Output

Result Statement: Members will provide 1:1 mentoring or small-group academic enrichment activities during and after school throughout the school year.

Target: 75 students will receive mentoring.

Instrument: Member time logs; activity logs at each site; teacher survey at least once (1x) per year.

Performance Measure Statement: Members will provide 1:1 mentoring or small-group academic enrichment activities during and after school throughout the school year. 75 students will receive mentoring.

RATIONALE AND APPROACH

BACKGROUND. Through its signature program, Experience Corps, Civic Ventures proposes to engage 602 older adults as quarter-time and minimum-time members in four major activities: tutoring, mentoring, classroom assistance, and family involvement. AmeriCorps members will serve alongside an equal number of leveraged volunteers. Member and volunteer efforts will benefit nearly 11,000 children each year in 130 urban public schools and neighborhood organizations across 14 high-need communities: Tempe, Tucson, & Mesa, AZ (Maricopa and Pima Counties); San Francisco, Marin, & Oakland, CA; Baltimore, MD; Minneapolis & St. Paul, MN; New York, NY; Cleveland, OH; Portland, OR; Philadelphia, PA; and Washington, DC. In year one alone, members and volunteers would provide more than 300,000 hours of service to children, families, and schools – nearly a million hours of service over a three-year period. Additionally, during 2008-2009, Washington University in St. Louis will complete a rigorous evaluation of Experience Corps’s outcomes for older adults and its impact on young children’s reading achievement. This evaluation, funded by The Atlantic Philanthropies, will inform program improvement and serve as an important resource to other intergenerational interventions.

Established in 1997, Civic Ventures seeks to redefine the second half of life as a time of individual and social renewal – encouraging Boomers and other older adults to work in education, health care, elder care, and other fields where human talent is desperately needed. The oldest of Civic Ventures’ five major initiatives, Experience Corps has grown from a five-city demonstration to an award-winning national program that now engages 2,000 older adults in high-impact service to elementary- and middle-school age children through local affiliate organizations in 19 cities. AmeriCorps has been an essential national partner since 2001.

Research by Johns Hopkins University, Public/Private Ventures, Policy Studies Associates, and others suggests that the program works for older adults, children, and schools. We call this Experience Corps’s “triple win.” By its design – engaging older adults to serve the next generation – Experience Corps intersects with three of the Corporation’s strategic priorities: Mobilizing More Volunteers, Ensuring a Brighter Future for All of America’s Youth, and Harnessing Baby Boomers’ Experience.

The aging of America presents unprecedented opportunities. In “Mapping the Growth of Older America,” the Brookings Institution notes that the nation’s Boomer population will increase by 50% between 2000 and 2010. This group of older adults is “more highly educated, with more professional women, and more diverse than its predecessors.” AmeriCorps’s continued investment in Experience Corps, the largest national service program for older adults outside the federal government, will add capacity in high-need communities, contribute to new learning about “what works” in the field of engaging older adults to serve young children, and leverage continued private support for dissemination, evaluation, and replication.

COMPELLING COMMUNITY NEED. Experience Corps’s proposed AmeriCorps program (“EC”) will place trained older adults as tutors, mentors, classroom assistants, and family involvement facilitators in some of the nation’s highest-need schools and community organizations. Research tells us that these are roles where trained volunteers can make a significant impact; teachers, principals, and program participants confirm that these are areas of high need; and we know that Boomers and other older adults are eager to answer the call to serve. Civic Ventures’ “New Face of Work” survey, conducted with Princeton Survey Research Associates in 2005, tells us that half of Americans age 50 to 70 want jobs that contribute to the greater good now and in retirement. And the recent CNCS report “Keeping Baby Boomers Volunteering,” confirms that education-focused roles like tutoring, mentoring, and coaching are among the top three activities that retain Boomers as volunteers from one year to the next.

Exhibit B- Civic Ventures Proposal to CNCS 2008 Reapplication Narrative

Experience Corps has focused the majority of its efforts on helping young children learn to read. The reason is simple: tremendous consensus exists that children must learn to read well by the end of the third grade; and that children who show early signs of reading difficulty need specific support to catch up with their peers and regain confidence in their ability to learn. Studies of reading development indicate that a child's chance for reaching grade level proficiency decrease sharply if a student enters the fourth grade without having gained appropriate grade-level skills. As the National Reading Panel report notes, "[R]eading failure has enacted a tremendous long-term consequence for children's developing self-confidence and motivation to learn, as well as for their later school performance." Dr. Reid Lyon (National Institute of Child Health and Human Development) testified to a Senate subcommittee in 1998 that: "[I]f you do not learn to read and you live in America, you do not make it in life. Consider that reading skill serves as the major avenue to learning about other people, about history and social studies, the language arts, science, mathematics, and the other content subjects that must be mastered in school ... Because of its importance and visibility, particularly during the primary grades, difficulty learning to read squashes the excitement and love for learning that many youngsters enter school with." Experience Corps's approach focuses community resources on the important social problem of early reading difficulties, estimated to affect as many as 40% of the nation's young children.

Children need more than skill development, though, to succeed in school. More and more research emphasizes the benefits of mentoring to academic and social development, especially for those children who live in distressed home environments or whose parents must work more than one job to make ends meet. For some students, a tutor or mentor may be the only adult who can give them individual attention each week. Teachers appreciate the extra help that students get from a tutor; and when a member is placed in a classroom setting, the teacher can spend more time with students who may need her expert help. Family involvement, too, plays a role – not only in helping students complete homework or come to school on time but in meeting basic needs that enable students to pay attention to learning. For example, after learning about the dangers that poor dental health presents, a team of EC members in DC worked to secure parents' permission for children at one elementary school to receive free dental care.

The personalized attention and skilled support that Experience Corps's AmeriCorps members and volunteers provide for children meet a critical need. The schools we serve face many challenges – overcrowded classrooms, test scores below the state average, failure to meet No Child Left Behind benchmarks, and high levels of poverty. Many first- and second-grade children we tutor are already two years behind in reading development. Early, sustained, individualized attention is a critical resource for young children who lack the literacy skills and the positive attitude toward learning that are the building blocks for school success. Older elementary-age children, and those entering the middle grades, need sustained support for learning to read for meaning across all subject areas. EC members, with guidance from project directors and school staff, apply their pre-service training and their life experience to improve students' performance, their self-confidence as learners, and the school and family supports available to enable their success.

The communities served by Civic Ventures' eleven subgrantees face particularly difficult challenges and demonstrate particular needs for the type of services that AmeriCorps members and volunteers would provide through this grant. The largest number of members would be placed in Philadelphia, Baltimore, and New York. Along with Cleveland, these places are among the communities with the lowest median incomes and the highest rates of people in poverty in the US, according to the 2006 American Community Survey (US Census). They also have a significant older adult population available to serve. Philadelphia has a particularly high proportion of residents 65 and older, with relatively low educational attainment and weak participation in the labor market among the population as a whole. Baltimore is also a rapidly-aging city that shows stark differences between racial and ethnic groups in educational attainment. One-third of Baltimore's white adults, but only 10% of Black adults, have a college degree. In New York, median household income decreased and income disparities grew between ethnic groups in

Exhibit B- Civic Ventures Proposal to CNCS 2008 Reapplication Narrative

the 1990s. While the city as a whole is relatively young, in part because of an influx of immigrant families, seniors are a higher than average share of the population. (Brookings Institution, Living City Profiles 2007, from 2000 Census data.)

The communities we serve in the Western United States have different demographics, yet equally compelling needs. For example, according to the 2000 Census, nearly a third of Maricopa County's rapidly growing population is 45 or older; more than 20% of residents are 15 or younger. While overall educational attainment is relatively high, and one-third of residents work in professional jobs, child poverty is twice the rate of older adult poverty (19% vs. 8%). Nearly a quarter of county residents speak a language other than English at home, and 45% of these reported that they did not speak English "very well." Mesa and Tempe, two of our newest Experience Corps affiliates, engage the area's Boomer population in tutoring grade K-4 students who are scoring below expected benchmarks for their age.

Beyond the hardships presented by poverty and less-educated adult family members, the cities we serve also suffer from severely underperforming school systems or striking achievement gaps between majority and minority groups. As noted above, many schools in the districts we serve are failing to meet No Child Left Behind targets. In Tucson (Pima County, AZ), 25% of third graders read below grade level, while half of the county's high school students cannot read at grade level, suggesting that students lose ground each year they are in school. In Portland, OR (Multnomah County) the elementary schools where EC members serve feed into high schools that historically have had some of the lowest graduation rates in Oregon. In the three subgrantee cities represented in the 2007 National Assessment of Educational Progress Trial Urban District Assessment (Cleveland, DC, New York), lower-income students of all races as well as Black and Hispanic students scored below the 50th percentile in reading. The District of Columbia's NAEP results show a shocking disparity between Black students, scoring at the 20th percentile, and white students, scoring at the 87th percentile. Statistics in the other communities we serve -- looking at sources such as Census and school district data -- are equally sobering.

The community needs and corresponding member roles described in this proposal have been identified through attention to demographic and social policy trends (particularly in education), analysis of recent research about Boomer volunteering, dialogue with subgrantee organizations working closely with service sites, observation of on-the-ground practice over the last several years, and review of our own performance. In particular, we have added a more structured family involvement component and refined member roles based on recent feedback from teachers, principals, members, and subgrantee staff.

DESCRIPTION OF ACTIVITIES AND MEMBER ROLES. Civic Ventures is requesting 145 MSY as 492 quarter-time and 110 minimum-time members, a total of 602 member positions. Each subgrantee will recruit, train, place, and support between 15 and 172 members, depending on the number of service sites in each city. This configuration allows members to be placed in teams of at least four per site (an essential element of Experience Corps's model) and to serve 10 to 15 hours a week for 30 weeks during the school year.

AmeriCorps members engaged in Experience Corps projects will carry out one or more of the following four activities: tutoring elementary-age children whose academic achievement lags behind that of their peers, particularly in reading; mentoring elementary- and middle school-age youth who need the support of an additional caring adult; providing academic assistance to individual students or small groups in a classroom setting, under the direction of a teacher; or facilitating family involvement activities. The majority of member time overall will be dedicated to tutoring (approximately 80 MSY) or classroom assistance (approximately 35 MSY), with the remaining time split between mentoring (20 MSY) and

Exhibit B- Civic Ventures Proposal to CNCS 2008 Reapplication Narrative

family involvement (10 MSY). Members will also participate in recruiting and community outreach activities.

Member activities add critical capacity to local service sites. Tutors, mentors, and classroom assistants all enable greater attention to students who need additional support. As tutors and mentors, members develop consistent one-on-one relationships with students and track their growth over most of a school year. Classroom assistance roles are more varied, reinforcing skills for students who are lagging behind or adding enrichment time for students who are ready for new learning. Teacher feedback from annual surveys shows that classroom assistance from a trained volunteer makes it possible for teachers to spend more time with students who are most in need of expert help. Family involvement, a proven strategy for increasing student achievement and school performance, is an area where members are eager to contribute. School district priorities also call for a renewed focus on involving families; for example, in Baltimore, principals are being evaluated for the first time this year on parent involvement at their schools. Experience Corps members, often residents of the communities where service sites are located, are well-positioned to create stronger relationships between schools and families. Experience Corps's recently-published "Leading With Experience" tool kit highlights some of our members' successful efforts to reach out to parents.

Individual member assignments are based on each subgrantee's specific program intervention, designed in conjunction with service sites; members' interests; and members' skills as determined by the application and screening process. All members serve as part of a team at a service site, developing supportive relationships among four to twelve peers. Nearly all of the service sites are public elementary schools. Some members in Portland, Tempe, Washington DC and the Bay Area will serve after-school as well as during the school day.

**Member Development and Training.* All new members and volunteers receive between eight and 30 hours of pre-service training, depending on their service assignment. Pre-service training is supplemented by monthly in-service training as well as ongoing coaching at the service site. Literacy tutors receive training that enables them to support No Child Left Behind's reading-related requirements. Similarly, members who will serve as mentors, classroom assistants, or family involvement facilitators receive training that is appropriate to their role. Training for classroom assistants gives members additional skills to help them work successfully with the classroom teacher and adapt to school culture, including resources such as "Understanding School Culture: Becoming an Effective Border Crosser" from LEARNS Northwest Regional Lab. Training for members engaged in family involvement will be developed in conjunction with schools, to ensure alignment with each site's goals, and will draw on materials such as Anne Henderson's recently republished *Beyond the Bake Sale: The Essential Guide to Family-School Partnerships*.

Topics that are common to all pre-service member training, regardless of assignment include: orientation to AmeriCorps and national service; orientation to EC elements and philosophy; required policies, procedures, and paperwork; basic information about child and youth development; managing behavior issues in a one-on-one setting and in small groups; communicating with teachers and school personnel; and working in teams. Members are placed at service sites in teams, and each team receives an orientation to the service site as part of the pre-service training. Members returning for a second year of service receive "refresher" training that lasts between four and eight hours. Second-year members often mentor new members and volunteers. Post-training questionnaires, twice-yearly performance reviews, and an annual member survey gauge the effectiveness of training as well as member satisfaction. Interested members have opportunities for leadership roles at their service sites or within the program as a whole. Many of Experience Corps's AmeriCorps alumni have taken on part-time staff roles after completing one or more terms of service.

Exhibit B- Civic Ventures Proposal to CNCS 2008 Reapplication Narrative

The Corporation's member satisfaction survey for 2006 and 2007 shows that 89% of Experience Corps's AmeriCorps members rate their in-service training as "good" or "excellent," higher than the 84% national average of all AmeriCorps national direct programs.

*Supervision. Each subgrantee assigns a full-time staff member as a project director. This person's responsibilities include ensuring that members and volunteers receive adequate on-site supervision and support, maintaining regular contact with personnel at each service site, and reviewing members' performance twice a year. Members also have a "point person" who provides additional support at each service site. This might be a part-time paid staff person (often, in recent years, an older adult), or an experienced member who is designated as a team leader. VISTA members may also provide support at some schools. VISTAs and other AmeriCorps members are not designated as member supervisors, but may coordinate tutoring schedules, facilitate the collection of timesheets, help collect and analyze performance measure data, or serve as a liaison between members and school personnel. At many schools, particularly those where AmeriCorps members are placed in classrooms, a teacher or other staff member is assigned to support members' day-to-day activities.

The Corporation's member satisfaction survey for 2006 and 2007 shows that 90% of Experience Corps's AmeriCorps members rate their host organization's supervision as "good" or "excellent," higher than the 88% national average of all AmeriCorps national direct programs.

*Ongoing Training and Education. In addition to pre-service training, members and volunteers attend monthly team meetings and monthly or quarterly training opportunities. Examples of in-service topics include instruction on using materials and tools related to a particular service activity, such as choosing good children's books for reading aloud; building skills related to other aspects of service, such as diversity, working effectively with teachers, or conflict resolution; or simply providing information on areas of interest to members such as changing neighborhood demographics or healthy aging. A partnership with Elderhostel also allows us to provide \$800 lifelong learning scholarships to a few participants in each city. In 2007-2008, we've distributed about 75 of these scholarships to members and volunteers – with new requests each week. These have proven to be a popular incentive, particularly among Boomers.

*Prohibited Service Activities. All subgrantee organizations sign an annual subgrant agreement with Civic Ventures that includes a list of the prohibited service activities and requires compliance with the Corporation's rules with respect to these activities. Subgrantee organizations include discussion of the prohibited activities in pre-service training for all members. In addition, as part of the enrollment process, each member signs an agreement that lists the activities and requires compliance with the same rules. All eleven of this year's subgrantees have at least two years of experience with AmeriCorps, so this requirement is already familiar to project directors and to any returning members. Civic Ventures and Experience Corps national staff support compliance through technical assistance available on the organization's intranet, site visits, conference calls, annual meetings of the program network and ongoing phone/email communications.

MEASURABLE OUTPUTS AND OUTCOMES. Experience Corps will measure outcome indicators for members' tutoring, mentoring, and classroom assistance activities, as well as outputs for family involvement efforts. Based on our last three-year grant cycle, we have the opportunity to review our previous performance in three of these four areas and to refine both tracking and reporting systems. This is an ongoing process for us, and over the last two years we have increased the resources dedicated to internal assessment processes. Additionally, during 2008-2009, we will have the opportunity to compare findings from the Washington University study with the data we are collecting ourselves. Preliminary

Exhibit B- Civic Ventures Proposal to CNCS 2008 Reapplication Narrative

results from this study that are available during the first half of 2008 will help us refine our performance measures.

For tutored children, we plan to measure academic growth during a single school year. To measure growth, we will review tutoring logs of children tutored and hours of tutoring; survey tutored children's teachers at baseline and end of the service year to determine improvements in specific skills; and, when available, review the results of standardized assessments (e.g. DIBELS, Gates-McGinitie) appropriate to each school district or local project curriculum.

For mentored children and youth, we will measure the growth in each student's self-confidence related to academic success. To track progress, we will conduct pre- and post surveys with referring school personnel and with each student's mentor.

Teachers who benefit from members' assistance in the classroom will report that the presence of a member improves learning opportunities and learning support for all students in the classroom. To track this outcome, we will survey classroom teachers at least once a year.

For family involvement, a new measure this year, we will increase the number of school-related family involvement activities (recurring) and events (one-time) in schools. To track this output, we will determine the baseline activities at each school and then count the number of new activities or events that members facilitate. We will also collect anecdotal information about the nature of the new activities and any available feedback from parents or teachers.

In addition to measuring the impact of members' activities at service sites, we will track specific aspects of member development. Team-based training, service and leadership opportunities will give members opportunities to gain new knowledge, increase positive interaction with peers, and make a measurable impact in their community. At the conclusion of each training session, subgrantees will gather feedback about members' satisfaction with the learning experience. At the end of each service year, members will complete a survey to assess their overall satisfaction with their service experience, including the effectiveness of pre-service and in-service training.

Each member's performance will also be reviewed by the appropriate supervisor twice per service year to ensure that he or she has the skill set and appropriate supervision to successfully execute their service assignments.

Tracking Progress. EC's national staff reviews the performance measures and evaluation tools with all subgrantees at the beginning of each new service year via a conference call, and on an individual basis as requested. For the last two years, we have retained a graduate student with expertise in research methods and statistics to advise on instrument design, data collection processes, analysis, and reporting. Common evaluation tools are made available to all subgrantees on the program's intranet. In the middle of the service year, EC national staff conducts check-in conference calls to monitor progress towards meeting the measures. During annual audits, we also review each subgrantee's program evaluation system to trouble shoot challenges and suggest how to better streamline their processes. At the EC national office, we aggregate all the raw data and then provide each subgrantee with an analysis report that documents their progress toward the grant performance measures and the national direct aggregate data. Subgrantees then are required to submit annual performance reports, incorporating their narrative reports with their quantitative evaluation outcomes. Finally, subgrantees are surveyed annually on how the common evaluation tools can be revised to better support the local evaluation processes. The entire evaluation process not only allows us to track our program outcomes, but also provides us with the tools to improve our overall program.

Exhibit B- Civic Ventures Proposal to CNCS 2008 Reapplication Narrative

Plan for Self-Assessment and Improvement. Civic Ventures places a high priority on both monitoring and assisting subgrantees. Experience Corps's national staff maintains frequent contact with program and financial staff at the operating organizations, visits each city at least once each year, includes staff from each city at a national conference at least once each year, hosts regional meetings, and encourages regular learning exchanges among cities through conference calls and our web-based intranet. National staff who visit local sites write an internal site visit report upon their return to the office that is shared with the entire national team by email. We conduct written evaluations of the national and regional meetings, and we use participants' responses to inform planning.

We have also been using Survey Monkey, an on-line tool, to gather feedback on conference calls and other virtual interactions.

Our office audits each subgrantee's member files and program-related financial records each spring, either on-site (for the newest and largest subgrantees) or using a desk-audit protocol (for smaller, established, and high-performing subgrantees only). On an annual basis, Civic Ventures' auditor and our Vice President for Finance and Administration review the tools that staff use for these audits as well as the findings. Execution of annual subgrant agreements, monthly review of financial and time log information in WBRs, in-person site visits, and twice-annual data collection give us opportunities to monitor compliance and to quickly identify any issues that require attention. These same processes enable us to identify strengths and innovations that can be shared among all subgrantee organizations. The program's intranet, regular conference calls or webinars, and a twice-monthly email from Experience Corps's national director to local staff are the primary dissemination vehicles.

Our national office in Washington, DC is constantly taking in information from our local affiliates, from Civic Ventures' offices in San Francisco and Boston, from research about our program, and from research by other organizations on topics of interest. Synthesizing and disseminating information to improve our own practice and that of our affiliates is a core function of our office.

Community Involvement. Experience Corps operates as a partnership in each city we serve, through an agreement between Civic Ventures and a local affiliate organization. Our local affiliates are a mix of community-based organizations (e.g. Greater Homewood Community Corporation in Baltimore; Sunset Neighborhood Beacon Center in San Francisco), volunteer centers (e.g. Make A Difference in Maricopa County, AZ; Volunteer Center of Southern AZ in Tucson), national and statewide institutions (Temple University's Center for Intergenerational Learning; Volunteers of America-Minnesota) and public agencies (e.g. the City of Tempe's Social Services Division).

All organizations included in this grant provided input into member service activities and the overall program design through three formal vehicles between October and December 2007: an on-line survey, a written application, and a conference call with Experience Corps's Associate Directors. In addition, a series of conference calls over the last year, a national meeting including an AmeriCorps-specific pre-conference session in July, and regional meetings in October/November, and site visits to individual cities served as rich feedback opportunities. A similar set of conference calls, meetings, site visits, and on-line feedback strategies as well as required reporting will keep community partners engaged throughout the grant period. At the local level, formal partnerships with schools and school districts along with regular contact between Experience Corps staff and service site stakeholders ensure that program activities and operations continue to meet community needs.

Each subgrantee chooses multiple service sites based on criteria such as children's needs (e.g. the percentage of children scoring below state standards, the percentage of families living in poverty), the principal or site director's interest, the ability of the site staff to provide resources that support high-quality service (e.g. tutoring space, data collection assistance, partial funding); and the accessibility of the site to older adults. Most service sites have had AmeriCorps members placed there for at least two years.

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New service sites are carefully chosen by local program staff, and an annual memorandum of agreement governs each site's responsibility to members and volunteers as well as the program's responsibilities to the site.

Relationship to other National and Community Service Programs. Experience Corps works closely with other Corporation-supported programs at both the national and the local levels. The Corporation for National and Community Service has been an essential supporter of Experience Corps since its inception in 1995. Civic Ventures has been a national-direct AmeriCorps grantee since 2001. The program's original five-site demonstration was launched in conjunction with Senior Corps (then the National Senior Service Corps); therefore, some of the oldest Experience Corps projects – in Cleveland, Minneapolis, New York, and Portland – actually operate as complements to RSVP within the organization. Along with RSVP and Foster Grandparents, the Bay Area program is a partner in Generations for Education, a coalition of non-profit intergenerational volunteer agencies that places older adults in youth-serving organizations. Some subgrantees utilize AmeriCorps*VISTA members (e.g. Baltimore, DC, Portland, San Francisco); and manage Foster Grandparent programs (Portland, Minneapolis). These other sources of Corporation support enhance and complement AmeriCorps*National service in each city. Subgrantees also work with their state commissions to share training resources and participate in days of service.

At the national level, Experience Corps staff members contribute to the national service community in a variety of ways. John Gomperts, the program's CEO and Civic Ventures' President, serves on the boards for HandsOn/Points of Light and Volunteer Match. Michelle Hynes, the program's Director, serves on the National Mentoring Board for America Learns and the CNCS research working group. Thenera Bailey, one of our Associate Directors, serves on the CNCS training and technical assistance working group. Several of our staff participate in a monthly meeting of DC-based national-direct grantees.

Potential for Replication. The last four years of Experience Corps's history have been characterized by intensive growth: nearly tripling in size in five of our largest cities and adding five new places to the Experience Corps network during the 2006-2007 program year. Both of these types of growth – particularly the opportunity to partner with new affiliates in Grand Rapids, Mesa, New Haven, St. George (UT), and Tempe – confirm the program's replicability. We have had the opportunity to start new affiliates both with and without AmeriCorps support over the last several years, and our current strategy requires any new affiliate to raise 100% of start-up costs from local sources (which might include partnering with a state service commission). Organizations in Annapolis, MD and Evansville, IN have raised funds to initiate Experience Corps service in Fall 2008.

During the first half of 2008, Experience Corps will receive a final report from Public/Private Ventures on privately-funded expansion efforts from 2002-2006, as well as preliminary results from the Washington University evaluation. We expect this information to play a critical role in shaping our next phase of growth. Promoting and disseminating these results as they become available will also play a critical role in securing future funding at the local and national levels.



MEMBER OUTPUTS AND OUTCOMES

MEMBER RECRUITMENT AND SUPPORT. While AmeriCorps members may be of any age, few national-direct programs engage a large number of older adults in stipended service. Through our experience with AmeriCorps since 2001, and with smaller pilot projects from 1995-2000, Civic Ventures and Experience Corps have developed unique expertise in recruiting, training, engaging, and supporting older adults in service to young people.

Recruiting strategies include local print advertising, community presentations to a variety of secular and faith-based organizations, presence at health fairs and other community events that attract older adults, web-based outreach, and zip-code targeted mailings sponsored by AARP state offices or other locally-respected partners. We consistently hear from established projects that current members make their best recruiters, and therefore personal outreach through members' networks is an important strategy as well. Nearly 40% of new members say they joined because an Experience Corps member or someone else in the community approached them personally. To support local staff and member recruiting efforts, EC's national office publishes high-quality recruitment materials and helps local projects customize materials and messages. Our print and web-based materials, including a newly designed web site with a page for each local project, reflect social marketing research about what appeals to older adults.

We have been very successful in engaging members who live in the communities we serve. This has resulted in a Corps that is largely made up of African-American women. Of the 300 new members and volunteers who joined Experience Corps in 2006-2007, 89% were women and 54% were African-American. Corps members in Arizona, California, and Oregon are somewhat more racially diverse than our Corps as a whole; and volunteers (unstipended) tend to be a more diverse group than our AmeriCorps members. Several of our communities are now publishing recruiting materials in Spanish or with images that reflect Spanish-speaking communities, and we hope that this will help us recruit a larger number of bilingual members. Our members come from many different professions – teachers, postal workers, clerks, machinists, graphic designers. (About 20% are former teachers.) Their life and work experience allows our members to serve as great role models for young people.

We assess member satisfaction through a written annual survey. Members also have opportunities to give feedback to their site supervisor at regular team meetings. Our own data collection and the CNCS 2006/2007 member satisfaction surveys show consistently high levels of satisfaction among our members.

Training that prepares members for service and leadership development that helps members deepen their impact in the community are two elements common to all Experience Corps projects, whether or not they engage AmeriCorps members. A focus on outcomes is essential to our program model, and members cannot make a measurable impact without appropriate training. We also know that preparing members for service leads to a more satisfying experience and therefore enhances retention. As described above, all members receive pre-service training appropriate to their assigned role as well as in-service training on topics of interest throughout the year. Team meetings, held at least once a month, provide opportunities for peer support and questions.

Members assigned as tutors meet specific standards and requirements that allow them to support No Child Left Behind priorities and that comply with the Corporation's guidelines. All AmeriCorps members and EC volunteers fill out a written application, participate in one or more interviews, and go through a name-based or fingerprint-based background check before they are placed in a service assignment. The written application allows project staff to assess potential tutors' comfort with reading and writing, while the

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interview provides an opportunity to assess peer interaction and other interpersonal skills important to helping children learn. Pre-service training provides another opportunity for project staff to evaluate potential tutors' qualifications. Tutors are required to have a high school diploma or, in the few cases where a potential tutor lacks this qualification, to pass a standardized test identified by the program in consultation with the school district. The basic educational requirement is generally not a barrier; more than half of Experience Corps members are college-educated, and only 5% of last year's new Experience Corps members lacked a high school diploma.

All tutoring either follows a research-based curriculum, under the direction of a trained staff person, or is explicitly integrated with a public school's instructional program, under the direction of a classroom teacher. Training for pre-service tutors gives members and volunteers appropriate knowledge and skills related to the five basic reading components. In Philadelphia, tutors are trained to utilize materials from the curriculum used by the school district; teachers and reading specialists provide a large portion of the pre-service and in-service training. In New York, tutors have used the University of Virginia's Book Buddies curriculum for many years. This is a highly effective, intensive curriculum that is designed for a tutoring environment. It has a strong research base – an independent, control-group study (Meier & Invernizzi, 2001) found positive results for students tutored by Experience Corps members in the South Bronx and a more recent study found similar results for all first grade students tutored by an Experience Corps member. Washington, DC uses "Sing Spell Read and Write," published by Pearson Learning Group, which focuses on phonemic awareness, systematic phonics instruction and vocabulary development for struggling readers.

In addition to other pre-service and in-service training, members and volunteers assigned to tutoring roles gain specific knowledge and skills about early literacy development, the five key components of reading identified by the National Reading Panel Report, how to read with children and help them develop reading strategies, and how to develop a learning plan and daily lesson plans for tutees. Training related to literacy development and the five key components of reading is typically provided by a reading specialist or other school district staff. Local programs utilizing a specific curriculum for tutoring (e.g. Book Buddies) provide instruction that ensures faithful, effective implementation to achieve the best possible results. National EC staff review each local project's pre-service training plan and recommend additions and improvements if needed. Over the last two years, we have strongly recommended the use of resources from LEARNS/Northwest Regional Lab to enhance pre-service and in-service tutor training.

Please see the Member Activities and Roles section, above, for additional information related to member training and support, including opportunities for lifelong learning and leadership.

ETHIC OF SERVICE AND CIVIC RESPONSIBILITY. Experience Corps participants have significant life experience and often join AmeriCorps as an extension of a lifelong commitment to civic responsibility that may include military service, local elected positions, or civil rights activities. Therefore, EC subgrantees design in-service training and structured reflection opportunities that are appropriate to members' age as well as their existing knowledge and skills. In 2003, the national EC office published a Citizenship Curriculum to help local projects fulfill the AmeriCorps requirement to provide citizenship training to their members. This curriculum, the first of its kind, consists of three modules: reflections on the meaning of citizenship, communicating the meaning of citizenship to the next generation, and exploring opportunities for leadership. In recent feedback to us about the curriculum, New York's project director wrote: "This year we had Citizenship training in three boroughs. It was well received by the members. Many of our members take great pride in their work but find it difficult to see the "big picture" of what their presence means for the children and the community that they serve. Members did writing exercises on the basic rights and responsibilities as citizens and discussed the historical impact on being a citizen in their community." More recently, we published a tool kit entitled

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“Leading With Experience,” which describes member-led community projects and provides tools for other organizations interested in developing community leadership opportunities for older adults. The national office encourages subgrantees to integrate activities from both of these publications into members’ in-service training. Both are also available to other organizations free of charge through our web site at www.experiencecorps.org.

ENROLLMENT. Our enrollment rate for 2006-2007 was 88% and averaged 90% over the last three-year period. There are two major reasons we have failed to enroll 100% of our slots in previous years: one that is related to our program model and one that is specific to our older adult population. First, nearly all subgrantees allow members to enroll throughout the program year. The majority of members start in the fall, but we also have a sizable group that start in January or February. Second, the majority of our members have historically been African-American women in their 60s. While our membership has become somewhat more diverse over the last two years, we still have a large number of members whose terms of service are interrupted by health or caregiving issues. (Data available from the Washington University study of our members confirms that personal health is the top reason that new members in 2006-2007 did not complete a year of service, and one of the top two reasons that completing members reported they did not plan to return for a second year.) A more frequent rate of suspension than AmeriCorps generally sees among younger members means that a portion of our population is always completing a 12-month term of service over a two-year calendar period; and then begins a second term of service in the middle of a program year. This has created an unhealthy cycle of late enrollments and service terms that overlap grant years. Because the schools in which we work have fairly high student mobility, allowing members to start mid-year has not interfered with student intervention goals. However, we recognize that this enrollment pattern does not optimize the use of Corporation resources nor does it maximize the service that could be provided to schools. Therefore, we made a decision last summer to end enrollments for 2007-2008 by January 15 – giving all active members time to complete their terms by the end of our program year on August 31.

As part of this application process, national staff also analyzed enrollment and completion rates for each of our subgrantees since 2001 (the first year that Civic Ventures received an AmeriCorps grant). Information from this analysis was used to initiate individual conversations with each prospective subgrantee organization and was a major factor in our request for a portion of our slots to be minimum-time rather than quarter-time. The changes we’ve made to enrollment timelines in 2007-2008, as well as revisions to the structure of our 2008-2009 slot request, will allow us to reach full enrollment and will also increase the number of members who complete their terms within a single program year.

Retention. The study of Experience Corps that Washington University is conducting has already given us some important information about the reasons that members do not complete or do not return to service. Of the 306 new members (AmeriCorps, other stipend, and volunteer) who joined Experience Corps between August and November 2006, 70% of them completed a full academic year of service. More than 30% of those who left during the year cited health reasons; 16% of the non-completers left the program for financial reasons (they found paid work or needed to find paid work). Of those who completed the year, the large majority reported that the experience met or exceeded their expectations. Over 80% report that they are likely or very likely to return to the program the next year. This is consistent with information we received from the Corporation’s recent survey of our AmeriCorps members, in which 94% of the members surveyed report that their experience so far is “good” or “excellent.”

Our year-to-year retention is strong, exceeding the 70% average that the Corporation reports for Boomers. However, we are seeking ways to improve our completion rate for members enrolled in the program. Stronger screening mechanisms related to foreseeable health and financial issues, more realistic expectations of the time members can commit each week, and ongoing in-service support for members’ overall health can improve our completion rate. Baltimore, Portland, and the Bay Area all received grants

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last year to focus on integrating wellness activities into member training. The national office will disseminate and encourage replication of promising practices from these places.

COMMUNITY OUTPUTS AND OUTCOMES

Our AmeriCorps program consistently meets or exceeds performance measure targets related to increasing student achievement, improving classroom learning environments, training members, and recruiting volunteers. Independent research also confirms the value of our program to children, teachers, principals, schools and the older adult participants. Great stories like this one also illustrate the impact members are having in communities:

Meredith Riley worked with a credit and collection agency for 40 years in Philadelphia. When she retired, she learned about Experience Corps and decided to become a volunteer. Two years later, the 70-year-old says it's been an amazing experience.

"I have learned so much about children!" she says. "A lot of them come into the room with low self-esteem. They're very self-conscious, and they're afraid of meeting people. I talk about my experiences out in the work field and I relax them. I get them to join in with me so we can work together."

Sometimes, she says, you can see progress immediately.

"I worked one-on-one with a young girl who could only read at the third-grade level. By the end of the term she was reading on a sixth-grade level," she says. "But you have to sit with them, you have to be steady with them, and you can't break down, you can't be overbearing. You have to try to think like they're thinking—and you have to be very, very patient."

The kind of reading progress Ms. Riley describes, along with the confidence she instills in her students, is one example of sustainable impact. Data from current studies of the programs in New York and Baltimore confirm that AmeriCorps members are helping young readers gain critical building blocks – like word attack skills and new vocabulary – for school success. The impact that 600 members will have through this grant on thousands of students represents an investment that will pay dividends for years to come.

Sustainability is also represented by the diverse funding sources that support the AmeriCorps program in each community. Other federal agencies (e.g. the US Department of Education), cities, states, private foundations, and individuals are all contributing a share of the program's cost in local communities. A number of subgrantees have secured multi-year commitments from foundations that support member training, additional hours of service, and evaluation efforts. The emphasis that the national office and its partners have placed on capacity-building for individuals and communities will ensure that the Corporation's investment is multiplied each year and sustained over time.

VOLUNTEER RECRUITMENT AND SUPPORT. Both AmeriCorps members and local staff recruit volunteers to expand Experience Corps's reach. Most volunteers serve alongside members, contributing two to five hours each week as tutors or mentors. Because these participants are fully integrated into the program, strategies for recruiting, training, support, and recognition do not differ from those used for members. Additional volunteers are recruited for episodic projects and days of service; family involvement events will provide new opportunities for this type of volunteering in 2008-2009. In 2006-2007, 758 unstipended volunteers added 54,086 hours of service to our AmeriCorps program. We expect to recruit at least 600 volunteers in 2008-2009 who will serve 46,000 hours as tutors, mentors, and family involvement facilitators. This averages about 3 hours/week for 25 weeks during the school year.

Experience Corps affiliates are seeing an increase in the number of Baby Boomers that are participating as AmeriCorps members and as unstipended volunteers. In fact, of the 300 new members and volunteers who joined Experience Corps in 2006-2007, more than half are aged 50-64. (Based on Washington

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University data collection.) This trend is particularly evident in our newer subgrantee sites in Arizona and Utah. We anticipate continuing to see growth in the number of Baby Boomers engaged as AmeriCorps members and volunteers. Because recent research shows that Baby Boomers are looking for service that builds on their life experience, and retention is highest among Boomers who are utilizing professional skills, we have been exploring strategies for expanding the types of roles our subgrantees offer to volunteers. Experience Corps's national office now promotes a volunteer model titled DREAM: Development, Recruitment, Education, Administration, and Management. Introduced at the Experience Corps national meeting in July 2007, this model's goal is to attract a diverse group of volunteers and place them in roles that meet their interests as volunteers while adding to organizational capacity. Because this is an emerging trend, we have not yet set targets for the number of hours volunteers might serve in these roles. However, we expect to be able to do so within the next six to twelve months.

CAPACITY BUILDING. Providing training for members and volunteers, developing older adults' leadership in communities, focusing on helping young students build academic skills, and increasing families' involvement in children's education all build the capacity of high-need urban schools. Managing an AmeriCorps subgrant and carrying out the proposed activities also builds each participating organization's capacity to leverage additional community support. As noted in the first section of this proposal, Experience Corps's "triple win" brings resources and needs together in ways that have both immediate and enduring value for communities.

The communities served by Civic Ventures' eleven subgrantees face particularly difficult challenges and demonstrate particular needs for the type of services that AmeriCorps members and volunteers would provide through this grant. The largest number of members would be placed in Philadelphia, Baltimore, and New York. Along with Cleveland, these places are among the communities with the lowest median incomes and the highest rates of people in poverty in the US, according to the 2006 American Community Survey (US Census). They also have a significant older adult population available to serve. Philadelphia has a particularly high proportion of residents 65 and older, with relatively low educational attainment and weak participation in the labor market among the population as a whole. Baltimore is also a rapidly-aging city that shows stark differences between racial and ethnic groups in educational attainment. One-third of Baltimore's white adults, but only 10% of Black adults, have a college degree. In New York, median household income decreased and income disparities grew between ethnic groups in the 1990s. While the city as a whole is relatively young, in part because of an influx of immigrant families, seniors are a higher than average share of the population. (Brookings Institution, Living City Profiles 2007, from 2000 Census data.)

The communities we serve in the Western United States have different demographics, yet equally compelling needs. For example, according to the 2000 Census, nearly a third of Maricopa County's rapidly growing population is 45 or older; more than 20% of residents are 15 or younger. While overall educational attainment is relatively high, and one-third of residents work in professional jobs, child poverty is twice the rate of older adult poverty (19% vs. 8%). Nearly a quarter of county residents speak a language other than English at home, and 45% of these reported that they did not speak English "very well." Mesa and Tempe, two of our newest Experience Corps affiliates, engage the area's Boomer population in tutoring grade K-4 students who are scoring below expected benchmarks for their age.

COST EFFECTIVENESS AND BUDGET ADEQUACY

COST EFFECTIVENESS. Our total request to CNCS is just over \$1.7 million, with \$992,964 matched (58% of the requested amount and 37% of the total budget) . With the adjustments we've made in the slot types requested -- a mix of quarter-time and minimum-time -- Civic Ventures will engage the same number of AmeriCorps members as we have over the previous three-year period at \$12,600 per MSY; while requesting 5 fewer MSYs and reducing our request for federal dollars by more than 10%. The projected 300,000 hours of service by Experience Corps's AmeriCorps members and volunteers will cost only \$5.77/hour in federal funds. Beyond the highly cost-effective service hours, this proposal brings with it the added promise of a rigorous privately-funded evaluation (valued at nearly \$2 million) that will benefit other intergenerational service programs.

DIVERSE NON-FEDERAL SUPPORT. Civic Ventures has secured a generous multi-year commitment from The Atlantic Philanthropies to support Experience Corps's national office and five of its largest affiliates from June 2006 through May 2009. This is the primary source for matching funds in the parent budget. In addition, the program is currently supported at the national level by grants from HRC Foundation and Patton Family Foundation as well as a small gift from Fidelity. In-kind support is provided by Elderhostel, in the form of \$800 lifelong-learning scholarships available for 6 to 8 members in each city we serve. Our 2007 funders included the Charles Stewart Mott Foundation, David and Lucile Packard Foundation, Robert Wood Johnson Foundation, The UPS Foundation, United Way of Greater New Haven, and Virginia G. Piper Charitable Trust. We are currently seeking renewal funding from several of these sources as well as from new prospects.

Likewise, the 11 subgrantees have secured a diverse array of non-federal support, both cash and in-kind. For example, Baltimore received nearly \$100,000 of Title I funds from Baltimore City Public Schools; Philadelphia was awarded \$500,000 in state funds, presented to them by Rep. Dwight Evans in November 2006; and Portland received funding from the Northwest Health Foundation's Kaiser Permanente Community Fund and from the Bill and Melinda Gates Foundation's Northwest portfolio. Bay Area's Experience Corps was awarded a three-year mentoring grant from the U.S. Department of Education, totaling more than \$400,000 through 2010. The Bay Area project also received \$150,000 over three years from the California Wellness Foundation. Minneapolis/St. Paul received a \$10,000 corporate gift from Symantec for the first time. Our two newest subgrantees in Arizona, Mesa and Tempe, were able to start Experience Corps programs in 2006 with two years of support from the Virginia G. Piper Charitable Trust.

Our affiliates secure in-kind assistance from partner organizations in the areas of recruiting, training, publicity, member recognition, and fundraising. Partners also help to connect service sites, as well as the children and families served, with community resources. For instance, the school district and local schools provide considerable in-kind support expert training for members and volunteers, staff time to supervise and support volunteers, space for training and service activities, and member/volunteer background checks. Continuing education institutions, faith-based groups, state and local offices of the AARP, state service commissions, and businesses such as banks or grocery stores are other important local partners.

DECREASED RELIANCE ON FEDERAL SUPPORT. As illustrated by the array of matching sources, Civic Ventures and its local partners are leveraging the federal support from AmeriCorps to deepen program impact for participants and for service sites. Budgets demonstrate that subgrantees have steadily increased the amount of matching funds over the last three years, showing \$844,659 across 13 organizations in 2006-2007; \$862,444 across 11 organizations in 2007-2008; and \$914,999 across the same 11 organizations in 2008-2009. Local match represents 31% of the total budget in 2006-2007, 32% in 2007-2008, and 34% in 2008-2009 -- showing a small but steady decrease in the percentage of federal

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support requested to support the same number of members. Civic Ventures raises private funds to support about 75% of the staffing needed to support training, technical assistance and grants administration; as well as all of the other direct costs such as staff travel.

BUDGET ADEQUACY. At both the national and the local level, the most significant budget item is staffing. We have paid particular attention over the last two years to ensuring that local staffing reflects both direct support for member activities at service sites, and “back office” support for maintaining member records and other auditable documents. As a result, larger subgrantees like Philadelphia have added full-time Business Manager or Data Coordinator positions; and smaller places like Portland and the Bay Area have added additional training or field staff. At the national level, we added an additional position to our Training, Technical Assistance, and Grants Management (TTAG) staff to improve internal knowledge management and ongoing feedback to subgrantees. Beyond staffing, budgets reflect an emphasis on training, recruiting, recognition, staff development, and program supplies.

EVALUATION SUMMARY OR PLAN

Experience Corps is a research-based program. Previous surveys and studies conducted by Policy Studies Associates, Public/Private Ventures, Johns Hopkins University, and others have demonstrated the program's benefits to students, schools, and members. (See, for example, P/PV's Rewards of Giving: An In-depth Study of Older Adults' Volunteer Experiences in Urban Elementary Schools; Johns Hopkins' articles in the 2004 and 2006 Journal of Urban Health; and Policy Studies Associates' EC in Urban Elementary Schools: A Survey of Principals.)

With funding from The Atlantic Philanthropies, Washington University in St. Louis and Mathematica Policy Research are currently conducting a rigorous, independent evaluation of Experience Corps's impact on tutored students and on participating members. Data collection began in fall 2006, and is continuing through spring 2008. We are especially pleased that the research team was able to secure permission from three school districts for a control-group design that randomized student participation in tutoring; and that the member study will include nearly all of the 19 EC cities. Results will be available at the end of 2008. We expect the design and the results of this evaluation to provide valuable data and insights not only to EC affiliates, but also to other national service programs seeking to engage older adults in service and high-commitment volunteering. Enrollment in AmeriCorps and the average number of hours served each week will be among the variables for analysis.

In the member study, standardized measures are used to capture five domains of well-being outcomes: physical health and functioning; emotional health; cognitive function; engagement; and self-identity. Most measures come from the Midlife in the US study (MIDUS), the Health and Retirement Survey (HRS), or the National Health Interview Survey (NHIS). The study also captures aspects of the members' EC experience, including type of engagement (one-to-one tutoring, group activities, etc.); level of engagement (hours per week); and stipended or unstipended position. Post-test interviews also include questions about perceived benefits of participation and intent to remain involved. This research will be an important complement to the multi-year study that Johns Hopkins University is conducting in Baltimore, with funding from the National Institutes on Aging.

The evaluation of student outcomes is taking place in three cities: Boston, New York, and Port Arthur, Texas. Data collection is occurring over two academic years (Boston and New York in 2006-2007, and Port Arthur in 2007-2008). A significant number of AmeriCorps members are among the tutors in New York; Boston and Port Arthur engage stipended tutors but these older adults are not enrolled in AmeriCorps. The research uses a two-group, pretest-posttest experimental design. Given that more students are eligible for the EC program than we can serve, students referred to the program in the Fall were randomly assigned to receive program services or to the control group. At the beginning of the school year, trained interviewers conduct assessments on all students in the EC program and control group, using standardized measures of reading. Standardized measures of reading include: Peabody Picture Vocabulary Test-III; Woodcock-Johnson Passage Comprehension; and Woodcock-Johnson Word Attack. Teachers also complete measures of reading performance. School records are collected and reading assessments are repeated at the end of the school year. Statistical analysis will indicate not only if EC students make more progress over the year than non-EC students, but if certain factors (like amount of tutoring or grade level) are associated with different levels of improvement.

Documents are attached to this proposal that describe the current status of the member study and the student study, including some descriptive data about participating older adults as well as preliminary findings from teacher interviews. We have already shared this information with Robert Grimm, Director of the Corporation's Office of Research and Policy Development, and will continue to share findings as they become available.

Exhibit B- Civic Ventures Proposal to CNCS 2008 Reapplication Narrative

Three of our subgrantees (Baltimore, Cleveland, and Philadelphia) also agreed to participate in a 2007-2008 study by the Center for American Progress that will document and analyze the roles AmeriCorps members are playing in public schools.

Experience Corps Tempe

City of Tempe - Library and Social Services Division

Application ID: 08ND085103

Budget Dates:

	Total Amt	CNCS Share	Grantee Share
Section I. Program Operating Costs			
A. Personnel Expenses	24,216	8,216	16,000
B. Personnel Fringe Benefits			
C. Travel			
Staff Travel			
Member Travel			
Total	\$0	\$0	\$0
D. Equipment			
E. Supplies			
F. Contractual and Consultant Services			
G. Training			
Staff Training			
Member Training			
Total	\$0	\$0	\$0
H. Evaluation			
I. Other Program Operating Costs			
Travel to CNCS-Sponsored Meetings	750	0	750
Total	\$750	\$0	\$750
Section I. Subtotal	\$24,966	\$8,216	\$16,750
Section I Percentage		33%	67%
Section II. Member Costs			
A. Living Allowance			
Full Time (1700 hrs)	0	0	0
1-Year Half Time (900 hours)	0	0	0
Reduced Half Time (675 hrs)	0	0	0
Quarter Time (450 hrs)	0	0	0
Minimum Time (300 hrs)	30,165	25,635	4,530
2-Year Half Time (2nd Year)	0	0	0
2-Year Half Time (1st Year)	0	0	0
Total	\$30,165	\$25,635	\$4,530
B. Member Support Costs			
FICA for Members	2,307	1,961	346
Health Care	0	0	0
Total	\$2,307	\$1,961	\$346
Section II. Subtotal	\$32,472	\$27,596	\$4,876
Section II. Percentages		85%	15%
Section III. Administrative/Indirect Costs			
A. Corporation Fixed Percentage			
Corporation Fixed Amount	0	0	0
Total	\$0	\$0	\$0
B. Federally Approved Indirect Cost Rate			
Section III. Subtotal	\$0	\$0	\$0
Section III Percentage		0%	0%
Section I + III. Funding Percentages		33%	67%
Budget Totals	\$57,438	\$35,812	\$21,626
Budget Total Percentage		62%	38%
Required Match		n/a	
# of years Receiving CNCS Funds		n/a	
Total MSYs		3.00	

Experience Corps Tempe
City of Tempe - Library and Social Services Division

Cost/MSY

\$11,937

Civic Ventures Financial Census For Experience Corps/AmeriCorps Projects 2008-2009

Please complete the form, answering each question or statement. You may need to ask others in the organization for assistance. For any "No" answers, please indicate *why* in the *Comments* section. Once complete, the form should be reviewed and signed by an authorized individual familiar with the organization's financial systems.

		Yes	No	Comments
1.	Organization has written financial management policies, including, but not limited to:			
	Internal Controls			
	Billing Procedures			
	Personnel Policies			
	Accounting Procedures Manual			
2.	Is the organization required to have an independent audit?			
3.	Is the organization required to have an A-133 audit? (Federal law requires all nonprofit organizations to have an A-133 audit whenever the organization expends \$500,000 or more in federal funding.)			
4.	Is the audit available for the most recent fiscal year?			
5.	The individuals responsible for the agency's financial records are sufficiently experienced and trained for the task.			
6.	Board members are insured against liability.			
7.	There is a budget for each program showing projected and actual income and expenses.			
8.	Organization has a written and updated chart of accounts showing what line categories and sub-categories are in use and how they coordinate with the agency's reporting requirements.			
9.	Organization's financial data is sufficiently accurate and timely (current within 30 days) to be used for planning, monitoring, and decision-making purposes.			
10.	Organization's financial reports contain all information needed by decision-makers.			
11.	The organization's financial reports meet the requirements of its funding sources.			

		Yes	No	Comments
12.	There is a separate filing system for all financial receipts, forms, and records.			
13.	The organization's cash disbursements are supported by adequate documentation.			
14.	Organization has an up-to-date journal system summarizing each month's transactions, including, but not limited to the following:			
	General Ledger			
	General Journal			
	Cash Receipts Journal			
	Cash Disbursements Journal			
	Accounts Receivable Ledger			
	Accounts Payable Ledger			
15.	Organization tracks each major grant or contract and can identify monthly expenses charged to each funding source.			
16.	Organization has established a system for separation of duties, ensuring that no one individual controls all aspects of a financial transaction (i.e., receiving cash, depositing cash, recording cash, reconciling bank account).			
17.	Organization has a system to ensure that those who authorize purchases are not the ones who pay for them, or at least have required counter-signatures for checks.			
18.	Organization has a written purchase order/check request system.			
19.	Organization has a closely controlled petty cash system.			
20.	There is a system for handling all contributions, grants, and earnings including a means of providing contributors with receipts and reports.			
21.	Is there currently a system to track matching, both in-kind and cash?			
22.	Does the matching system separate expenses by program?			
23.	If more than one program is being funded, accounting system must be able to differentiate between the programs – e.g. staff time is spent monitoring or supporting 2+ programs. Do you have an allocation plan to determine how much of each employee's salary goes to each program?			
24.	Do you currently have line items on your chart of accounts to track expenses eligible for reimbursement by the AmeriCorps Grant?			

If your audit were next month, would you have current:	Yes	No	Comments
• Bank statements and reconciliations			
• Contracts with Independent Contractors			
• Quarterly Payroll tax forms			
• Leases, loan agreements, insurance policies			
• Personnel/Benefit policies			
• Depreciation Schedule			

If your audit were today, how would you answer:	Yes	No	Comments
• Are personnel files complete? Does each member have his/her own file? Are timesheets, W-4, I-9, and identification all located IN A CLEARLY DESIGNATED FILE SYSTEM AND IN A SECURE LOCATION??			
• Does your Accounts Receivable tie out to your Aging report?			
• Are there receipts and backup for all items paid to individuals?			
• Can you produce invoices to backup the CNCS reported amount of money spent on supplies (or any other line item) for your program?			
• Can you produce invoices to backup the CNCS reported number used as matching expenses? Can these invoices be tied back to the source of funding used for the expenses?			
• Do your payroll numbers correspond with the reported AmeriCorps member stipend amounts?			
• Were 1099 forms issued to independent contractors and consultants?			
• Is CNCS paying more than its % share of the stipend costs, if each member is paid the minimum stipend? (85% for Grant Year 07-08; no minimum for 08-09)			

Acknowledgement – to be signed by two representatives of the Project Affiliate, one Project staff representative and one organizational financial representative.

We declare that we have examined and completed this form, and to the best of our knowledge and belief, the responses provided are true, correct, and complete.

For Project Affiliate (Project Director/Staff):

For Project Affiliate (Org Financial Officer/Mngr):

BY: _____

BY: _____

PRINT NAME

TITLE

ADDRESS

DATE

PRINT NAME

TITLE

ADDRESS

DATE

Exhibit E
Parties Responsibilities Under the Grant

SubGrantee's Responsibilities

SubGrantee shall:

1. Serve as the primary provider of training and technical assistance for Project, including organizing trainings, providing day-to-day support to all Members throughout the program year, and ensuring high-quality service at each site where Members are placed. SubGrantee shall:
 - a) Identify one program staff member to oversee and promote the local project, and serve as liaison with the national office.
 - b) Provide additional staff and volunteers, as appropriate and applicable, to support project activities and maintain program quality.
 - c) Provide recruitment materials for community outreach -- e.g. brochures, applications, etc.
 - d) Actively recruit Members in accordance with national recruitment policies.
 - e) Educate and train Members in:
 - i. AmeriCorps and the National Service movement
 - ii. Experience Corps
 - iii. SubGrantee program goals and objectives, including specific literacy-related content and citizenship activities, as prescribed by the 2008 AmeriCorps Guidelines
 - iv. Member Agreement and Position Description
 - v. Service requirements and benefits
 - vi. Time and activity reporting
 - f) Develop program year schedule for Members, including training sessions, seminars, team group meetings, conferences, leadership training sessions and community events.
 - g) Ensure Members do not engage in prohibited activities as outlined in the AmeriCorps provisions when accounting for their time.
 - h) Develop, comply with, and distribute to Members and Civic Ventures, Grievance Procedures that are in compliance with AmeriCorps Regulations, http://americorps.gov/pdf/45CFR_chapterXXV.pdf.
 - i) Complete and submit an Experience Corps Project Member (ECPM) Report summarizing all member enrollment, status change, exit forms and monthly time logs for review by Civic Ventures no later than 25 days after the end of each month.
 - j) Conduct required searches for all AmeriCorps member applicants prior to any service including a Criminal History Records Search (by name or fingerprint) of the State criminal registry for the State in which your program operates and the State in which the applicant is residing at the time of application; and a National Sex Offender Public Registry search.
2. Provide accounting services for the Project, including but not limited to, the following:
 - a) Identify a key staff contact familiar with and responsible for Project-related financial transactions and reports;
 - b) Process living allowance payments;
 - c) Reimburse authorized travel;

- d) Ensure existence of appropriate workers compensation insurance;
 - e) Produce monthly Experience Corps Project Financial (ECPF) Reports and submit them to Civic Ventures via a format and style directed by Civic Ventures at least quarterly; and
 - f) Produce bi-annual Financial Status Reports and submit them to Civic Ventures by the 25th of the month following the quarters ending in September and March.
3. Complete reports and surveys as required by Civic Ventures, including financial statements consistent with OMB Circular A-133.
 4. Provide Civic Ventures with a copy of SubGrantee's most recent audit or approved financial statements prepared according to generally accepted accounting principles (GAAP).
 5. Make its financial and member-related files and documents available to Civic Ventures staff and representatives in accordance with Civic Ventures periodic visits and requests for documentation (see Civic Ventures Responsibilities, #2).
 6. Notify Civic Ventures promptly of any changes in key staff assignments with respect to program, financial, or administrative oversight.
 7. Develop and distribute forms for the effective evaluation and continuous improvement of the Program, including training questionnaires, community assessments, time and activity reports, and Member evaluations.
 8. Track National Objectives as defined by Civic Ventures using assessment tools and evaluation materials provided by Civic Ventures.
 9. Provide adequate resources, including but not limited to, administrative support, office space, computers with internet access, telephones, fax machine, office and program supplies, postage and copier.
 10. Attend and participate in Experience Corps trainings, meetings and conferences, when requested.
 11. Establish and maintain positive relationships with the sites at which services are provided by Members.
 12. Support the mission of Experience Corps and Civic Ventures.
 13. Build upon existing community relationships to support the Program by developing links to schools, volunteer programs, community-based organizations and faith-based organizations.
 14. Raise community awareness of the Program.
 15. Secure required matching funds as stated in the approved budget.

Civic Ventures Responsibilities

Civic Ventures shall:

1. Work closely with the SubGrantee to help assure Program quality.
2. Schedule project visits to review and evaluate project records, Member files, accomplishments, organizational procedures and financial control systems (see SubGrantees Responsibilities, #5).
3. Facilitate annually scheduled national meetings to strengthen the national network of Experience Corps projects.
4. Provide technical assistance to the SubGrantee through site visits, conference calls, materials, and meetings as appropriate.
5. Provide responsible review, approval and processing of Program forms and requests for payment.
6. Publicize Experience Corps nationally, through articles and other forms of media; and provide visibility for SubGrantee through the national Experience Corps website.
7. Collect data from the SubGrantee to distill lessons and best practices and assess the impact the Program is having on communities, children and Members.
8. Share collected and analyzed data with the SubGrantee as appropriate.



2008-2009 AmeriCorps Member Documentation Checklist

As of September 1, 2008, the following documents are required in all Experience Corps member files who receive living allowance payments funded by CNCS. The list of documents is subject to change.

- Member Application
- Signed and Dated Member Agreement
- Signed and Dated Member Enrollment Form (All pages)
- Interview Questions and Notes
- Notes from Calls to References
- State Criminal History Record Search(es)
- National Sex Offender Public Registry Check
- Documentation of AmeriCorps Eligibility
- I-9 Form and Documentation
- W-4 Form
- Emergency Notification Information
- Signed Self-Certification on Member Enrollment Form of High School Diploma, GED, or Other Educational Status
- Tutors WITHOUT High School Diploma / GED must pass a proficiency test.
(Please provide documentation of test and results).
- Tutors must have appropriate supervision by individuals with expertise in tutoring.
(Please list supervisor's name and title.)
- Current, Signed & Dated Member Time Sheets and Activity Logs in Chronological Order with direct and indirect activities separated
- Member Performance Evaluation Forms (Mid-term and End-of-term)
- Member Correspondence/ Documentation of Any Disciplinary Action
- Signed & Dated Member Exit Form

Report Schedule 2008-2009Program Information:

SubGrantee shall maintain in all AmeriCorps members' files, and make available for review by Civic Ventures, all required Corporation for National and Community Service forms and other required information and documents. Please refer to Member Documentation Checklist in Exhibit F.

The Experience Corps Project Member (ECPM) Report summarizing all members' enrollments, transfers, suspensions, exits and monthly time from the program must be submitted for review by Civic Ventures no later than 25 days after the end of each month. The format of this summary should be generated in a format and style as directed by Civic Ventures.

Financial Information:

I. Project Financial Report

Subgrantee shall request funds by completing and submitting, electronically, the Experience Corps Project Financial (ECPF) Report to Civic Ventures. The ECPF Report should be generated in the format and style as directed by Civic Ventures. Requests must be completed on a monthly basis, and must be submitted at least quarterly.

II. Financial Status Reports:

Projects are required to submit biannual Financial Status Reports no later than 25 days after the end of each six month period. Due dates are:

- A. 1st Reporting Cycle (April – September) – due by October 24, 2008
 1. Projects should complete two reports for this period.
One includes the PERs for April – September of the 07-08 grant and the other includes a PER for September of the 08-09 grant.
- B. 2nd Reporting Cycle (October - March) – due by April 23, 2009
- C. 3rd Reporting Cycle (April-September) – due by October 23, 2009

Evaluation:

SubGrantees are required to collect information related to the performance measures (Exhibit A) at the onset of each program year, at mid-year, and at the end of the program year as communicated by the Experience Corps national office. Deadlines generally fall in October, February and May. The deadlines for 2008-2009 will be determined, in part, by the reapplication schedule for new AmeriCorps National Direct applicants.