Robert Wood Johnson Foundation

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Program Results
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Growing Experience Corps

Expanding and assessing Experience Corps and establishing it as an independent nonprofit organization

SUMMARY

From December 2001 through December 2010, the Robert Wood Johnson Foundation (RWJF) funded Civic Ventures, a nonprofit organization in San Francisco now doing business as Encore.org, to:

- Expand its Experience Corps[1] program in which older adults tutor (with a focus on reading) and mentor elementary school students in low-income neighborhoods. The work took place in five cities that had mature Experience Corps programs—Boston, Cleveland, Philadelphia, New York, and Washington.
- Launch Experience Corps as an independent nonprofit organization[2] and continue its expansion

RWJF also funded Public/Private Ventures, a research, public policy, and program development organization in Philadelphia,[3] to evaluate the Experience Corps' expansion from November 2002 through July 2008.[4]

That firm's evaluators:

- Identified the challenges, strategies, and successes that were common across the five sites, as well as those that resulted from local conditions
- Evaluated the program's impact on volunteers' lives and how Experience Corps and similar programs can best attract and retain older volunteers

[1] Grant ID# 39367 for $6,818,161 from December 2001 through March 2007.
[2] Grant ID# 65021 for $1,500.000 from January 2009 through December 2010.
[3] Public/Private Ventures went out of business in the fall of 2012.
[4] Grant ID# 44332 for $746,809 from November 2002 through July 2008.

Key Results

Civic Ventures and Experience Corps reported the following key results to RWJF in 2010 and in a 2012 interview with the writer of this report:

- During the first grant (2001 through March 2007), Experience Corps more than doubled in size. Affiliates (local programs) in the five targeted expansion cities tripled or quadrupled services, as measured by the number of students, schools, and volunteers.
- Experience Corps established a national office in Washington in 2004 to support the expansion and the national network of programs.
- In January 2009, Experience Corps became an independent nonprofit 501(c)3 organization focused on early literacy (K–3) intervention. Experience Corps developed a five-year strategic plan, a national growth strategy, service delivery standards for affiliates, and project support standards for affiliates and the national office.
- At the end of the 2009–2010 school year, 2,059 older adults were working with 20,667 children in 202 schools in 23 communities through Experience Corps.

Key Evaluation Findings

In *Growing Bigger Better: Lessons Learned from Experience Corps' Expansion in Five Cities* (2008), Public/Private Ventures reported the following key findings:

- The sites met, or nearly met, their goals for school expansion. As a group, the number of Experience Corps in-school or community-based after-school programs increased from 34 to 101 over the course of the 2001–2007 expansion period.
- Most of the sites recruited many times more volunteers during the initial expansion. Volunteer enrollment increased from 42 to 116 per site (2001) to 160 to 538 per site (2007).

Funding

RWJF supported the initial (2001–2007) expansion with a $6.8 million grant and the 2009 launch of Experience Corps as an independent nonprofit organization with a $1.5 million grant, both to Civic Ventures. The Foundation supported the evaluation of the program with a $746,809 grant to Public/Private Ventures in 2002. Civic Ventures and Experience Corps raised an additional $21.2 million from other funders. See Appendix 1 for more information.

Afterward

In 2011, Experience Corps became part of AARP as AARP Experience Corps (although it retains its status as a separate nonprofit). This has given Experience Corps the opportunity to significantly scale the program.

CONTEXT

Research has demonstrated that:

- Sustained relationships with caring adults can make a major difference in the health and well-being of children.
- Older adults, who are particularly well suited to developing these relationships, also benefit by helping others.
- Strong social networks and productive activity are linked with helping older adults stay healthy and possibly live longer.

For more information on research about the benefits of relationships between children and caring adults and of volunteering, including specific citations, see Appendix 2.

Experience Corps Links Older Adults with Children

Experience Corps was designed to mobilize the time, talent, and experience of older adults to revitalize their communities. It started in 1995 as a pilot project at 12 elementary schools in five cities. The program recruited and placed teams of volunteers in the schools, which were located in low-income neighborhoods. By 2001, Experience Corps was in 15 cities and had 356 volunteers.

In a model that now includes kindergarten students, the volunteers tutor and mentor students, help teachers in the classroom, and lead after-school enrichment activities. The focus is on helping children learn to read. Volunteers commit about 15 hours a week as "full-time" members or about five hours a week as "part-time" members; "full-time" members receive a small monthly stipend.

Each program is housed in a host agency, a nonprofit or public organization (or in one case, a research and training center that is part of a university) that runs the program according to the national model. Schools that participate in Experience Corps pay a fee equal to about half the cost of the program. Fund-raising supports the rest of the program.

Organizational History

Public/Private Ventures a research, public policy, and program development organization in Philadelphia, initially managed Experience Corps, working in close collaboration with the National Senior Service Corps of the Corporation for National and Community

Service (now Senior Corps) and researchers from the Center for Aging and Health at Johns Hopkins University.

In 1998, Public/Private Ventures helped spin off Civic Ventures as a new nonprofit organization to focus on developing Experience Corps. The Corporation for National and Community Service continued its support for the new organization, through AmeriCorps. By 2001, when RWJF invested in the program's expansion, Experience Corps was in 15 cities and had about 900 volunteers.

Public/Private Ventures went on to do the evaluation of Experience Corps. In the fall of 2012, it ceased operations.

RWJF's Interest

RWJF's Vulnerable Populations Portfolio funded Experience Corps. When RWJF began its funding, the portfolio was focusing on reducing social isolation among vulnerable populations. By the start of the third grant in 2009, the project fit the Vulnerable Population's revised strategy of improving the health and well-being of society's most vulnerable people. More about the portfolio's strategy is available on the Foundation's website.

THE PROJECT

From December 2001 through December 2010 (with a 21 month break in 2007-2008), RWJF funded Civic Ventures to:

- Expand Experience Corps[5]
- Launch Experience Corps as an independent nonprofit organization [6]

RWJF also funded Public/Private Ventures to evaluate an initial period of expansion. Funding ran from November 2002 through July 2008.[7]

During this initial expansion, Civic Ventures worked in five cities that had mature Experience Corps programs—Boston, Cleveland, Philadelphia, New York, and Washington—to increase the numbers of children served, schools served, and volunteers recruited in each city. Civic Ventures also established a national office to guide the expansion and to support the entire Experience Corps network. Staff at the national office worked with several consultants:

[5] Grant ID# 39367 for $6,818,161 from December 2001 through March 2007.

[6] Grant ID# 65021 for $1,500.000 from January 2009 through December 2010.

[7] Grant ID# 044332 for $746,809 from November 2002 through July 2008.

- Andy Goodman at an a goodman event in Los Angeles on storytelling and communications
- Catalan deMatties in Washington on fund-raising strategy
- Fenton Communications in San Francisco on media outreach and public relations
- sagawa/jospin in Chevy Chase, Md., on corporate partnership strategy
- Williams Group in Grand Rapids, Mich., on design/messaging

Civic Ventures launched Experience Corps as an independent nonprofit organization in 2009, and the two organizations worked closely on strategic planning for Experience Corps, while continuing the program's expansion.

A Legislative Boost

Passage in 2009 and implementation in 2010 of the federal Edward M. Kennedy Serve America Act resulted, according to Project Director Michelle Hynes, in more effective recruitment and retention of Experience Corps members drawn from AmeriCorps due to the act's improved incentives for AmeriCorps volunteers 55 and older, as well as increased volunteer term limits. Hynes also notes that the organization in the future may be able to request a greater number of part-time positions funded by AmeriCorps, due to expanded federal authorization and appropriations for AmeriCorps under the act.

Challenges

Challenges During the Expansion Period (2002 to mid-2007)

Experience Corps faced challenges due to changes in legislation and funding affecting public schools, particularly related to the 2003 No Child Left Behind Act. Many schools stopped allowing one-on-one tutoring in which a volunteer pulled a child out of class. Some Experience Corps local programs (affiliates) therefore shifted to working with the students in the classroom and developed lunchtime programs. To work more effectively with classroom teachers, sites also had to align their training with each school district's standards, curriculum, and related materials.

As noted below under Findings and Lessons Learned, the Experience Corps sites also faced challenges related to the organizational development that rapid growth required. Not only did each expansion site have to partner with more schools and recruit more volunteers, each affiliate had to strengthen infrastructure and staffing related to the program's growth. In some cases, this placed unexpected stress on existing functions in the host organizations, such as human resources, technology, or volunteer recruitment.

Challenges in Becoming an Independent Nonprofit Organization and Expanding Further (2009–2010)

Deep cuts in public and private funding for nonprofit organizations made it more difficult than expected for Experience Corps to secure new sources of support. The CEO spent significant time, supported by consultants and staff, on fund-raising activities as well as on building relationships that could lead to new funding in the future. As a result of this work, the organization was able to secure both continued and new funding.

While transforming itself into an independent nonprofit, Experience Corps also chose to focus more strongly on K-3 literacy support. This meant that staff had to spend considerable time learning the landscape of the policy, practice, and key players (including funders) for this fast-changing and complex field.

Experience Corps also spent considerable time and resources trying to refine its brand by promoting the findings of a Washington University in St. Louis evaluation (October 2005 to September 2008). The Atlantic Philanthropies funded this evaluation; the results were released in fall 2008 and spring 2009. See Appendix 3 for a selection of findings.

Creating a new organizational infrastructure for a program already endowed with a 15-year history and a diverse national network of affiliates was also challenging for both Civic Ventures and Experience Corps.

As Experience Corps separated from Civic Ventures to develop as a new organization, it was left with a few experienced staff members. These were quickly joined by new staff members and a new board of directors. Bringing on new staff while simultaneously building a new organization, deciding on new priorities, and maintaining existing relationships in the field was difficult and time-consuming, according to Project Director Hynes. Veteran staff often felt overwhelmed by the challenge of carrying out the existing work while orienting new team members to their roles.

Over time, Experience Corps developed stronger systems for interviewing, screening, and orienting new staff so that they integrate more quickly into the organization. Hynes noted that doing all of this while managing relationships with, and setting new standards for, the affiliates presented an additional challenge. Extensive consultation with the affiliates helped mitigate this difficulty.

Evaluation

During 2002–2008, Public/Private Ventures identified the challenges, strategies, and successes that were common across the five sites, as well as those that resulted from local conditions. Laurie Kotloff served as the evaluation project director.

Methodology

The evaluators:

- Conducted interviews with program directors and program staff, national office staff, teachers, principals, and volunteers
- Surveyed Experience Corps volunteers annually
- Reviewed written materials the sites submitted to the national office

They also evaluated the program's impact on volunteers' lives and how Experience Corps and similar programs can best attract and retain older volunteers. They:

- Conducted 90-minute in-person interviews with the 43 volunteers in Boston, Philadelphia, and Washington (April 2003 through December 2004)
- Conducted 20-minute follow-up telephone interviews with seven volunteers who had left the program since the first interview (December 2004)

Other Funding

Between December 2001 and December 2010, Civic Ventures and Experience Corps raised $30.2 million for Experience Corps. Major funders were the Corporation for National and Community Service ($15.5 million), Atlantic Philanthropies ($10.3 million), and the U.S. Department of Justice ($2.76 million).

See Appendix 1 for more information about funding.

RESULTS

Civic Ventures reported the following results about the initial expansion to RWJF in March 2007:

- **Experience Corps established a national office in Washington. By January 2004, the office was fully staffed and supporting the expansion in the five cities as well as the operations of other Experience Corps sites:**
  - Staff included a nationally known CEO with strong connections to the policy and national service communities, John S. Gomperts,[8] as well as staff in communications, development, program, and policy.
  - The national office guided and supported the sites by:
    - Providing technical assistance to all sites via site visits, phone calls, emails, and consultations from outside experts

[8] Gomperts stepped down as CEO when the new Experience Corps CEO, Lester Strong, was hired in January 2009 to lead the new independent nonprofit.

- Convening project leaders of the expansion initiative at least once every six months, in person and on the phone, to share progress and promising practices. This included two three-day meetings.
- Convening the entire Experience Corps network at least once a year through a three-day national meeting
- Nurturing systems for peer-to-peer exchange of best practices, including conference calls, conference sessions by local project leaders, and an intranet that included information about best practices and a listserv

Civic Ventures and Experience Corps reported the following results of the work to launch Experience Corps as an independent, nonprofit organization to RWJF in 2010 and in a 2012 interview conducted for this report:

- **Experience Corps became an independent, nonprofit organization in May 2009, with an intensified focus on reading skills for K-3 students.** The new organization secured 501(c)3 status from the IRS and hired Lester F. Strong as CEO.[9] Strong had more than 35 years of experience as a senior executive, chief development officer, and broadcast journalist. Civic Ventures transferred key staff to Experience Corps, which reorganized and grew its staff; created departments, policies, and procedures related to its mission and capacity; and recruited a board of directors.

  "Experience Corps was poised to grow," says Strong. The one way to do that was to really make it independent."

- **Experience Corps developed a five-year strategic plan, a national growth strategy, service delivery standards for the affiliates, and project support standards for both the affiliates and the national office**. Grounded in research about the program and developed collaboratively with key stakeholders (e.g., affiliates, board members, and senior staff), they guide the organization's growth and promote consistency throughout the network.

  — ***Strategic Plan.*** The strategic planning process resulted in new vision and mission statements for Experience Corps:

    - The vision: Older adults in service to children are an integral part of the education strategy across America. Through this generational exchange, children succeed, older adults thrive, and communities are made stronger.
    - The mission: To create powerful opportunities for older adults to meet society's greatest challenges

    The strategic plan was three-pronged: (1) Align to proven practices, using research-based standards, to ensure consistent impact nationwide; (2) Sustain the

[9] Civic Ventures continued to manage some funds for the new organization during the transition as Experience Corps waited for the final IRS determination.

business model; and (3) Invest in national office infrastructure to support affiliates fully during expansion.

— ***National Growth Strategy.*** The national growth strategy required the affiliates to meet detailed standards for service delivery and program support and called for expanding (1) within schools currently served, (2) to other schools within those districts, and (3) to other districts. It laid out criteria for selecting districts, schools, grades, classes, and students with which to work.

— ***Service Delivery Standards.*** Service delivery standards cover subject content (primarily reading), curricula, and service intensity,[10] and focus on starting in the earliest possible grade. For example:

The Importance of Early Literacy

Children who have not learned to read by fourth grade, are unlikely to do well in school. "All the data tells us that if a child is not reading by the end of third grade, particularly if they're low-income and minority, there's an 80 percent probability he or she will drop out," said Strong. "With the drop-out comes a whole cascade of at-risk behaviors, including getting pregnant, going to prison, and joining gangs."

Evidence also shows that intervening at the earliest point possible in a student's schooling has the most academic impact. That is why Experience Corps decided to focus more strongly on K-3 literacy support, and made this a key part of the process for expanding the affiliate network.

— ***Project Support Standards.*** The project support standards cover governance and organizational structure, finance and operations (including IT), human resources, fund-raising, marketing and communications, and more.

To help the affiliates meet the standards, the national office developed two CD-ROM toolkits intended to strengthen recruiting and training older adult members, and provided affiliates with one-on-one coaching, conference calls, and webinars.

- **At the end of the 2009–2010 school year, 2,059 older adults were working with 20,667 children in 202 schools in 23 communities through Experience Corps.**
- **By the end of 2010, Experience Corps was able to sustain itself and position itself for future growth**. Read more about this in Afterward.

[10] Minimum of 35 sessions of at least 30 minutes each.

Communications Results

- **During the first grant, 2001–2007, Experience Corps built its identity and visibility nationwide through communications activities.** These activities included:
  - Re-launching the Experience Corps website in 2003 with new content, Web pages for each city, and an intranet for project directors
  - Publishing an eNewsletter, *Voice of Experience*
  - Developing branding standards for the national office and all sites
  - Developing a recruitment and visibility campaign that included presentations at community centers, posters of local volunteer heroes, transit and newspaper advertisements, and media outreach
  - Publishing *Appealing to Experience: Zeroing in on the Right Message*, a report designed to establish Experience Corps as a resource for information about how to recruit older adults as volunteers
- **Staff of the independent Experience Corps continued to promote the program, by:**
  - ***Disseminating the research studies*** on Experience Corps by Johns Hopkins University and Washington University in St. Louis to demonstrate evidence of its impact. The studies were published in peer-reviewed journals (e.g., *American Journal of Public Health* and *Journal of Gerontology: Medical Sciences*). Promoting these studies led to new opportunities for Experience Corps to bring the program to the attention of federal policy-makers.
  - ***Connecting with policy-makers*** by testifying in 2009 before the U.S. Senate Committee on Health, Education and Labor and Pensions on national service,[11] participating in federal committees and meetings such as the 2010 White House Committee for Reimagining Service,[12] and hosting White House education staff at the Boston affiliate. Also, the program's evaluation was mentioned on the U.S. Department of Education's What Works Clearinghouse™.
  - ***Getting media coverage*** by promoting local projects. This included more than 60 news stories in national and local print publications, online, and on television and radio, including national coverage in *Time Magazine and* the *Washington Post*, and on National Public Radio.

Also see the Bibliography.

[11] Invited by the staff of Senator Barbara A. Mikulsky (D-Maryland).
[12] Reimagining Service is a national, multisector coalition dedicated to increasing social impact through effective volunteer engagement.

FINDINGS

Public/Private Ventures reported findings on the initial expansion (2001–2007) in two reports. In *Growing Bigger Better: Lessons Learned from Experience Corps' Expansion in Five Cities* (2008), evaluators reported the following findings:

- **The sites met, or nearly met, their goals for expansion in the number of schools participating.** Despite major school reform efforts, budget cuts, and leadership changes, the five Experience Corps sites increased their number of in-school or after-school community-based programs from 34 to 101 in the period 2001–2007. These figures also include some community-based after-school programs for Boston.

  See the Table below for information about school and volunteer expansion at each site.

- **Although they did not reach their volunteer recruitment goals, the sites recruited large numbers of volunteers during the expansion.** Volunteer enrollment ranged from 42 to 116 per site before expansion. These numbers increased to between 160 and 538 per site at the end of the expansion period—for a range of from 1.78 to 9.12 times the initial number of volunteers.

  The new volunteers included many people who had not been involved in sustained volunteer activity in the past.

  Stipends ($180 to $300 a month) were an important incentive for attracting people who were willing to serve 15 hours a week. Boston experimented with offering lower stipends to volunteers who worked 10 hours a week. This was a promising strategy to attract part-time volunteers who were otherwise difficult to engage.

Table. The Experience Corps Expansion Sites

	Number of Volunteers			Number of Schools		
	Baseline	**Goal**	**Actual**	**Baseline**	**Goal**	**Actual**
Philadelphia	116	916	538	12	40	43
New York	48	448	327	4	20	17
Boston	42	442	383	7*	20	17**
Cleveland	60	260	253	6	16	15
Washington	90	290	160	5	16	9

* Includes four schools and three community-based after-school programs

** Includes 13 schools and four community-based after-school programs

- **Experience Corps sites increased the number of field staff and added layers of supervision—helping the sites maintain the level of oversight and support to schools and volunteers they had before they expanded.**

These management structures worked best when supervisors did not have competing responsibilities for other aspects of the programs. New program leadership and inadequate staffing levels sometimes compromised the effectiveness of the site's supervision infrastructure. Promoting from within the organization helped the sites build staff capacity and stability.

- **Most sites greatly improved their capacity to raise local funds; however, creating a diverse and stable funding base that will allow them to sustain their growth has proven more difficult.** The sites raised from 17 to 74 percent of their own budgets. Total funds raised were:

City	Amount
Boston	$3,020,291
Cleveland	$616,835
Philadelphia	$872,100
New York	$3,145,889
Washington	$851,126

Sites were most successful in raising funds from local foundations.

Two sites that had long-standing relationships with elected officials were able to obtain substantial federal- or state-earmarked funds, and three sites received federal or state grants. Raising money from individual donors or corporations was more difficult.

It was much more difficult than anticipated for sites to develop contacts within the school district's central leadership that might lead to stable funding from the schools.

In *Rewards of Giving: In-Depth Study of Older Adults' Volunteer Experiences in Urban Elementary Schools* (2006), evaluators reported the following findings:

- **Experience Corps members offered three main reasons for volunteering:**
  - ***A deep belief in the importance of helping others***. Individuals' belief in the importance of helping others had deep roots. Many people linked the desire to volunteer to their religious and moral convictions, while others said examples set early in life by family members were a source of inspiration. Still others were motivated by early educational and career experiences linked to service.
  - ***The chance to improve the quality of their own lives***. Many adults were looking for meaningful things to do in retirement. Program stipends, received by three-quarters of the volunteers who participated in the evaluation, were appreciated and, for some participants, were an important source of financial support. In addition, for, adults faced with loss, loneliness, or the stresses of caring for ailing loved ones, Experience Corps was a welcome reprieve.

— ***A good fit with volunteers' interests and availability***. Experience Corps members were drawn to the program's mission of helping children learn and found the flexible volunteer hours and service locations attractive. They also appreciated the fact that they only needed interest and basic literacy skills to apply.

- **Experience Corps members experienced three broad rewards in meeting the challenge of teaching young children to read:**

  — ***A sense of meaning and purpose*** was gained primarily through seeing children progress, experiencing the children's thoughtfulness, and believing that they were contributing to the well-being of future generations.

  — ***Mental engagement*** stemmed from the rewards of learning about new things, such as the mechanics of teaching reading and the art of forging relationships with youngsters.

  — ***Social engagement*** came from developing new friendships and tapping the social networks of other volunteers.

- **Volunteers noted three types of support as central to rewarding experiences:**

  — ***Programmatic supports***. Volunteers especially valued initial and ongoing training, and day-to-day support and guidance from a site coordinator.

  — ***Team environments*** of five to 15 volunteers enabled volunteers to forge collegial relationships and support one another throughout the school day.

  — ***Supportive school communities*****.** Sixty percent of volunteers said teachers gave them advice about instructional strategies, and 42 percent said principals played central roles in making them feel welcomed and appreciated.

LESSONS LEARNED

Civic Ventures reported the following lessons to RWJF about the initial expansion (2001–2007):

1. **To achieve consistent growth in a volunteer program, pay constant attention to the quality of participants' experience, the program's results for the target population, and the infrastructure needed to recruit, engage, train, and track participants and to evaluate their efforts.** By doing all of these things, Experience Corps helped the five sites meet, or nearly meet, their expansion goals. (Project Director/Hynes)

2. **Drive quality and sustainability through program evaluation.** The national office used evaluation results to share best practices among the sites and to help sites with poor performance in certain areas improve. (Project Director/Hynes)

Public/Private Ventures' report *Rewards of Giving: In-Depth Study of Older Adults' Volunteer Experiences in Urban Elementary Schools* (2006) offered six lessons on "essential practices" that made Experience Corps successful:

3. **To design a strong model, make sure to have a carefully integrated dual focus on older adults and children, not just children.** "The model contributes to successful gaining by crafting ways in which:
   - Volunteers play meaningful and active roles.
   - Volunteers are challenged by opportunities to learn new things and attain new skills.
   - Volunteers engage in service with a team of similarly committed members, with whom they form valuable relationships."
4. **Add a cross-generational component to service initiatives engaging older volunteers, even those that do not involve direct interaction with children.** "Almost a third of volunteers described feeling deeply enriched by the belief that they are contributing to the success of future generations." This belief can be tapped in other volunteer opportunities, such as "preserving the environment… and developing and sustaining desirable community spaces and institutions which stand to leave their mark on the future."
5. **To target older adults effectively, recruit through AARP, community centers serving seniors, senior residences, and service fraternities.** "Determining additional methods to engage older adults affected by loss, loneliness and the stresses of caregiving may be fruitful as well…. It may also be worthwhile to maintain incentives for active participants to recruit friends and acquaintances."
6. **Use a stipend.** It "is an impetus for some to volunteer, and it persuades many adults to serve a greater number of hours per week than they might otherwise."
7. **Offer flexible weekly schedules but at the same time ensure "significant volunteer commitments by insisting that individual sign on for a full school year."**
8. **Provide training and ongoing support.** This will "heighten volunteers' success."

   For more lessons from both Civic Ventures and Public/Private Ventures, see Appendix 4.

In 2010, Civic Ventures and Experience Corps reported to RWJF the following lessons from the launch of Experience Corps as an independent nonprofit organization:

9. **Realize that organizational change takes time and energy.** Despite starting with an effective program with a talented CEO and an experienced core staff in a supportive policy context, Civic Ventures vastly underestimated the extent to which building

internal infrastructure would consume the first year of the grant. In retrospect, a longer period of redundant systems and staffing—retaining the old while building the new—might have allowed the new CEO and board members to focus on how strategy and operations should unfold.

10. **Resist hiring new staff fast at the expense of hiring well.** In retrospect, says Hynes of Civic Ventures, the newly independent Experience Corps might have been better off if it had hired new staff more slowly and relied on Civic Ventures for some functions.

    "There's an impulse sometimes to get to the end, but we need to weigh the desire to be done and to move through this transitional time with being thoughtful about what success looks like and what's the right fit for the short- and long-term in terms of staffing," said Hynes, who was project director during both grants.

11. **Strive for balance between continued support and direction from the parent organization and the independence of the evolving new organization.** This was difficult for the new leadership of Civic Ventures and Experience Corps. Regular communication with staff and the affiliates, and honest efforts to see from each other's perspective, were both essential during the transfer of relationships, responsibilities, and assets from one organization to another. "We were very intentional about strategic and frequent communications," said Hynes.

12. **Start with enough operating capital—ideally, three full years—to really focus on developing internal infrastructure and culture.** Having 18 months of funding in the bank at the outset of the Experience Corps launch was an important gift from RWJF and other Civic Ventures funders that enabled the new CEO to balance internal and external roles.

13. **Consider what spinning off part of an organization will mean to the parent organization.** Civic Ventures focused on how to launch Experience Corps as an independent, nonprofit organization but did not consider the impact of this on Civic Ventures as an organization. "Just like when an individual person leaves, there's a gap. We let go of six people. We didn't think about the capacity and the relationships that we were letting go of and how that looked and felt inside the organization," said Hynes. "We haven't talked about this as a team so I'm not sure we even know, two years later, what all of the effects have been to Civic Ventures."

14. **Invest in research and communication about research results to build a program or organization.** Experience Corps used results from the research studies by Johns Hopkins University and Washington University in St. Louis (not paid for by RWJF) to show the impact of its work and tell a powerful story that led to increased awareness of the program by policy-makers. (Project Director/Hynes)

AFTERWARD

In 2011, Experience Corps became part of AARP as AARP Experience Corps (though it retains its status as a separate nonprofit). The strategic planning Experience Corps did during the second RWJF grant clarified the organization's view of itself, and was a key factor in AARP's interest in Experience Corps. "We had a cogent plan that we were able to share with AARP," said CEO Strong. "We knew where we were going, and we knew we wanted to scale significantly. We knew quality control and measurement and metrics were critically important."

Through the merger, AARP is meeting the desire of members to volunteer to help educate children in their communities, and Experience Corps is expanding more quickly than it could have alone.

"We needed a partner that would help us get the kind of numbers we thought were possible," said Strong. "For Experience Corps to have access to 38 million AARP members, a brand that is one of the most recognized and respected in the United States and an infrastructure that is connected in all 50 states and the territories gave us the opportunity to significantly grow the scale of the program."

The goal is to grow AARP Experience Corps so it is mentoring 100,000 children by 2017 by working with more schools and children in the cities that already have AARP Experience Corps programs and adding new cities. As of October 2012, AARP Experience Corps had about 1,750 volunteer members serving 22,000 children in 175 schools in 19 cities. For a list of cities with Experience Corps affiliates in 2012, see Appendix 5.

AARP provides operational support for AARP Experience Corps. Other major funders (2012) are AmeriCorps, Deerbrook Charitable Trust, the Noyce Foundation, Target Foundation, and the U.S. Department of Justice.

For more information about the process by which Experience Corps and AARP joined forces and lessons about this merger, see Appendix 6.

The website of the newly-situated AARP Experience Corps is *www.aarp.org/experience-corps*. It has content identical to the original Experience Corps website, plus a link to AARP's website. Both sites contain:

- A description of the AARP Experience Corps program, including cities where its affiliates operate, as well as a descriptive video of the program and testimonials by volunteer tutors
- A listing of research studies assessing program effects on students and volunteer tutors (with links to more detailed descriptions of that research). Specific research cited includes:

— Johns Hopkins University studies: the full text of three reports focusing on the health effects of the program on older adult tutors and a fourth report on the public health effects of marketed the program to seniors as a way to help students (versus marketing the program's health effects for seniors)

— Washington University in St. Louis/Mathematica Policy Research studies: three texts, two videos, and four briefs about the impact of AARP Experience Corps tutoring on student progress, and about benefits to tutors

- How to become a volunteer tutor (for adults 50 or over) or to donate to AARP Experience Corps
- A list of philanthropic, governmental, and corporate supporters of Experience Corps
- Summaries of news and other media coverage of the program

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Grant ID#: 44332
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Program Area: Vulnerable Populations

APPENDIX 1

Other Funders

In addition to the $6.8 million in RWJF funding for work done during the first grant (December 2001 through March 2007), Civic Ventures raised $14.3 million in the period from the following:

- Corporation for National and Community Service: $8.3 million
- Atlantic Philanthropies: $5 million
- U.S. Administration on Aging: $1 million

During the same period, other funders contributed to Experience Corps core operations and special projects (such as strategic planning), and piloting new service options (such as after-school enrichment).

Between the two RWJF grants to Civic Ventures (April 2007–December 2008), Atlantic Philanthropies and the Corporation for National and Community Service continued to support Experience Corps, providing about $5 million and $4 million, respectively.

During RWJF's $1.5 million second grant to Civic Ventures (January 2009 through December 2010), Experience Corps raised more than $6.9 million from the following:

- Corporation for National and Community Service: $3.2 million
- U.S. Department of Justice: $2.76 million
- Deerbrook Charitable Trust: $400,000
- Atlantic Philanthropies: $300,000
- The Noyce Foundation: $250,000
- Henry E. Niles Foundation: $10,000
- Individual and anonymous donors: $40,000.

APPENDIX 2

Benefits of Relationships with Caring Adults

Research on relationships with caring adults shows:

- A study of Big Brothers Big Sisters showed that young people with an adult mentor for one year had a 52 percent reduction in school absenteeism and improved school performance compared to a control group (*Making a Difference: An Impact Study of Big Brothers Big Sisters*, Public/Private Ventures, September 2000).
- Engaging adults in the lives of young people is one of the most important factors in protecting them from many risk factors, according to the multiyear survey of adolescent health funded by the National Institute of Child Health and Human Development and 17 other federal agencies (Tierney and Grossman, *Reducing the Risk: Connections that Make a Difference in the Lives of Youth*, University of Minnesota, 1997).

Benefits of Volunteering

Research on volunteering and older adults shows:

- Older adults who volunteer regularly tend to be happier as a group than those who do not volunteer. According to many studies:
  - 70 percent of older volunteers say they have a better quality of life than older people who do not volunteer (Chappell, *Volunteering and Healthy Aging: What We Know*, 1999).Many Experience Corps volunteers who reported difficulties on cognitively complex activities of daily living, such as d*riving a car or using a map before starting* the program, showed improvements in doing these tasks nine months later (Carlson, Seeman, and Fried, *Aging Clinical and Experimental Research*, 2000).
- The risk of death for those with strong social engagement—for example those doing volunteer work—was *less* than for older *adults with fewer and weaker social rela*tionships—by a factor of two to four (Rowe and Kahn, *Successful Aging*, 1998).

Significant research on older adults and volunteering has also been conducted by the Johns Hopkins University Center on Aging and Health (e.g., *Journal of Urban Health*, 2004 and 2006), as well as by the Corporation for National and Community Service.

Two recent studies by researchers at Washington University in St. Louis also add to the evidence base about the impact of senior volunteering for children and for the older adults. The research won an award from Generations United.

APPENDIX 3

Findings of the Washington University Evaluation

Researchers at Washington University in St. Louis in 2009 reported findings of a 2006–2007 study of 881 first, second and third graders from 23 schools in Boston; New York City; and Port Arthur, Texas, who were rated as very poor readers. The report from the study is available online.

In the study, the Experience Corps program tutored 430 of these students, with the balance (451) acting as a control group. The mean number of tutoring sessions was 45. Three-quarters of the students received over 35 sessions, which represents about one session a week throughout the program period.

Research findings indicated that the Experience Corps program had statistically significant and substantively important effects on reading outcome. Specifically, researchers found that, as compared to the control group, students in the Experience Corps program:

- Made statistically significant gains of more than 60 percent over the academic year when tested on passage comprehension
- Achieved 40 percent more progress in assessments of grade-specific reading skills made by their teachers. (However, the group difference on word attack[13] was marginally significant.)
- The effects were stronger when assessing only the Experience Corps students who received at least 35 sessions—a criterion that researchers chose to indicate that the students received the intervention as intended.
- The program impact was the same no matter what the gender, ethnicity, grade, classroom behavior, or English proficiency of the student. (However, researchers note, special education students in this study—defined as those with Individualized Education Programs [IEPs] in their student record—did not benefit from the program as much as nonspecial education students in reading comprehension. Researchers conclude that Experience Corps programming with special education students needs to be reconsidered in light of this finding.)
- Teachers overwhelmingly rated the Experience Corps program as beneficial to students, and they found that it meant no or a low additional burden to them.

[13] Word attack refers to a set of skills needed to make sense of an unknown word encountered in a text while reading. These include the ability to recognize the sounds that make up words and then to put those sounds together, as well as using context, prefixes or suffixes, or a dictionary to determine what a word means.

- Tutors perceived that the Experience Corps program had a positive impact on students, and their relationships with students were good. Further, tutor relationships with students were related to reading outcomes, with better relationships associated with better outcomes.

APPENDIX 4

Additional Lessons Learned from the Initial Expansion of Experience Corps (2001–2007) and the Evaluation (2008)

1. **Create specialized jobs to facilitate program growth.** The director of an Experience Corps site with 100 volunteers could organize volunteer training, oversee evaluation, answer media calls, and raise funds, with a little help from a site coordinator and a finance person. As the sites grew in volunteer participants and numbers of schools with programs, they had to divide these tasks into separate jobs. (Project Director/Hynes)

2. **Expect recruiting and retaining volunteers to be a year-round job as a program grows.** The Experience Corps sites had to hire dedicated staff or at least allocate dedicated staff time to do continuous outreach, screening, training, and placement. (Project Director/Hynes)

3. **Facilitate sustainability by raising a program's visibility**. Experience Corps invested heavily in communications activities to raise the program's visibility, including developing branding standards for the national office and all sites. As Experience Corps became better known, it was easier for the sites to attract new funding and new partners. (Project Director/Hynes)

4. **Expect program growth to impact the entire organization**. The expansion of Experience Corps impacted staff functions (e.g., accounting and communications), hiring practices, branding, and more. (Project Director/Hynes)

5. **Support local sites through a national office, and foster networking opportunities.** The Experience Corps sites appreciated the centralized support capacity the national office provided and the opportunities provided for networking with colleagues at other sites. (Project Director/Hynes)

6. **Remain flexible**. Leaders at the Experience Corps sites had to remain flexible to handle changing circumstances in schools. (Project Director/Hynes)

7. **Expect challenges when evaluating a fast-evolving, multisite initiative over several years.** Careful record-keeping by the Experience Corps national office staff and the standardized semiannual progress reports that the expansion sites were required to submit to the national office facilitated data collection by the evaluator. (Evaluation Project Director/Kotloff)

8. **Combine survey data and interview data in an evaluation**. The Experience Corps evaluation would have benefited from an annual organizational survey. This would have enabled the evaluators to assess quantitative changes systematically over time. "It's quicker for nuts and bolts questions to use a survey," said Kotloff. "Interviews can focus on the whys and hows."

APPENDIX 5

Cities with AARP Experience Corps Projects, 2012

Tempe, Ariz.
Marin County, Calif.
Oakland, Calif.
San Francisco, Calif.
New Haven, Conn.
Cleveland, Ohio
Evansville, Ind.
Boston. Mass.
Revere, Mass.
Baltimore, Md.
Grand Rapids, Mich.
Minneapolis, Minn.
St. Paul, Minn.
New York, N.Y.
Portland, Ore.
Philadelphia, Pa.
Beaumont, Texas
Port Arthur, Texas
Washington, D.C.

APPENDIX 6

The Process by which Experience Corps Became Part of AARP

Staff and board members at Civic Ventures/Experience Corps and AARP had known each other for many years. For example, an AARP board member also served on the board of Civic Ventures. After Experience Corps became an independent organization, Experience Corps CEO Strong approached AARP staff at a conference and suggested they work together.

Communicate, Analyze, and Plan

A series of discussions ensued about a possible merger of Experience Corps—a newly independent nonprofit—with the much larger AARP. As these talks began, AARP hired a consulting firm to study and vet Experience Corps work, including its business plan, revenue model, sustainability, and research.[14] At the same time, Experience Corps began to internally analyze the impact of joining forces with AARP and how AARP would ensure its sustainability.

Both organizations concluded that working together would be mutually beneficial. Next, they jointly paid for an additional consultant to look at the viability of merging the two organizations and—if this proved to be viable—to determine the best business model and

[14] Much of this vetted work was completed under a $1.5 million RWJF Grant ID# 65021 running from January 2009 through December 2010.

develop a plan for joining forces. The boards of Experience Corps and AARP approved the plan and the two organizations began work to integrate.

The Role of Change Management Consultants

AARP's hired change management consultants to help the Experience Corps team members understand and deal with the larger organization they were joining as well as the extensive systems changes (for example, in cultures, staffing, reporting) that a merger would require. "It's not 'them' and 'us,' it's all 'us,'" said Strong. "We had to work really hard and intentionally to understand and appreciate that."

These consultants helped Experience Corps staff focus on the necessity, as Strong put it, "To understand the nature of change and that change would be part of our life." Clear and frequent communication played a key role in this process, according to Strong, enabling the Experience Corps team not only to anticipate specific changes, but why these were necessary, and how they would impact, the work of Experience Corps.

"We're Better Together Than We Were Separately"

Joining forces with AARP has brought "unique and valuable assets" to both Experience Corps and AARP, according to Strong. With AARP's infrastructure and support, for example, Experience Corps has set out to refine its growth strategy to focus on "wholly owning" the cities it works in; that is, on directly managing the cities' programs to facilitate success and large-scale growth. Nonprofit organizations that previously ran the Experience Corps programs in Baltimore, Philadelphia, and Washington, are now part of AARP Experience Corps.

AARP Experience Corps will use the "wholly owned" model for all cities where it works in the future, including Chicago, where it has plans to bring the program to 25,000 children.

"That kind of launch would not have been possible had we not been within AARP," said Strong. "[AARP] opened the door to the head of the [Chicago] public schools and other influencers in the city." It provided "instant credibility" for the program. For its part, Experience Corps is enabling AARP to meet its goals to have a stronger presence in low-income and minority communities and to have an intergenerational program.

"We're better together than we were separately. We can see, going forward long term, how those assets will only become stronger and more valuable over time," said Strong.

Challenges in and Lessons about Becoming AARP Experience Corps

Challenges

Merging Experience Corps with AARP was not only a road to a more manageable future, it was quite a difficult path. There is no "magic way" of dealing with the "clunkiness" of merging different cultures, says Strong. It has been hard work.

For nonprofits that operate through local sites, mergers can present another challenge: keeping funders engaged. After its merger, Experience Corps funders often assumed that because it was now a part of AARP, the program no longer needed outside funding, which is not true. Although AARP provides operational support, the work done in the cities still requires funding.

Lessons

1. **Hire change management consultants to guide organizations that are merging**. The change management consultants "helped us identify potential pitfalls early and in so doing to avoid them," says Strong. In particular, these consultants helped Experience Corps staff focus on the necessity, as Strong put it, "to understand the nature of change and that change would be part of our life."

2. **Communicate changes clearly and frequently to staff**. Communication played a key role in the development of AARP Experience Corps, and in the willingness of staff to accept the changes. (Experience Corps CEO/Strong)

3. **Make the case for current funders to continue to support the new organization**. Strong and his team had to be clear with funders about the need for continued support of Experience Corps work on the ground. They cast this as good news—because AARP was now supporting the national office and other overhead due to the merger, more of the local support would directly impact the funders' cities. (Experience Corps CEO/Strong)

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www.experiencecorps.org. The Experience Corps website, called AARP Experience Corps, has an overview of the program, news, stories, publications, and information about the program's impact. Washington: Experience Corps. Launched in September 2003; redesigned in 2005 and 2008. Media coverage of Experience Corps is available online by year.

www.civicventures.org/experience_corps.cfm. The website of Civic Ventures[15] continues to have this section on Experience Corps. The section briefly describes the AARP Experience Corps program and contains links to "Innovations"—a slide show, audio commentary, and commentary transcript—and to the AARP Experience Corps website.

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[15] Civic Ventures has been renamed Encore.org.