

AARP Experience Corps

National Service Delivery and Project Support Standards

2012

MISSION: To create powerful opportunities for older adults to meet society's greatest challenges.

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.

July 2012

Dear AARP Experience Corps Affiliate Leader,

As we all look ahead to manage a high-quality program, AARP Experience Corps will strive to finely hone its mission and flawlessly execute our evidence-based model. We must also design and invest in systems and processes that are consistent network-wide. It is with that intention that we submit to you the revised *National Service Delivery and Project Support Standards*. The standards are based on the Johns Hopkins University and Washington University in St. Louis research on Experience Corps and informed by network colleagues who understand the day-to-day challenges and opportunities of running AARP Experience Corps programs. The standards are also drawn from my interactions with each of you, as well as the work the national staff does with you every day.

The goal of these standards is to continue to:

- Provide a framework to help members with the best tutoring and mentoring practices;
- Generate funding opportunities for AARP Experience Corps's demonstrated excellence;
- Ensure AARP Experience Corps members have a quality and meaningful experience while engaging with students and with each other; and
- Serve as a resource to orient staff that will deliver and support the work of the AARP Experience Corps program.

The AARP Experience Corps operating standards were created with these objectives in mind, and offer an accountability system that will guide, measure and improve the service and program models, so we stay innovative and become an integral part of the literacy intervention of schools and districts.

Our work is never done. We will continue to evaluate the standards to ensure that they are producing the measurable outcomes we desire, and that they align with the top research in the field.

I am inspired by the potential of these standards to make us stronger together. I'm also extremely encouraged by the depth of your contributed insights and fully understand how important your continued support will be as we fulfill the mission and vision of AARP Experience Corps.

Thank you for your commitment to ensure that all students have the opportunity to succeed in reading and to those trained and caring older adults who guide them.

All the best,

Lester

Table of Contents

National Growth Strategy.....	5
A. Priorities for SMART Growth.....	5
B. School Selection Criteria.....	5
1. District Selection.....	5
2. School Selection.....	5
3. Fee for Service.....	6
C. Grade Selection Criteria.....	6
D. Classroom and Student Selection Criteria.....	6
Service Delivery.....	7
A. Content and Curricula.....	7
1. Subject Content.....	7
2. Curricula.....	7
B. Service Intensity.....	8
1. Dosage Levels.....	8
2. Volunteer Member-Student Ratio and Consistency.....	8
Project Support.....	9
A. Volunteer Member Management.....	9
1. Volunteer Member Policies.....	9
2. Volunteer Member Requirements.....	9
3. Volunteer Member Service Agreements.....	10
4. On-Boarding and Training.....	10
5. Team Meetings.....	11
6. Volunteer Member Performance Management.....	11
7. Volunteer Member Recognition.....	11
B. Evaluation and Reporting.....	11
1. Program Data Collection and Reporting Processes.....	11
2. External Research.....	12
C. Finance and Development and Operations.....	12
1. Financial Management.....	12
2. Operations.....	13
3. Risk Management.....	14
D. Recruitment, Marketing, and Communication.....	14
1. Volunteer Member Recruitment.....	14
2. Marketing and Communication.....	15

E. Advocacy, Policy and School System Relationship Management.....15
 1. School System Relationship Management.....15
 2. Advocacy and Policy.....15
Glossary.....16

National Growth Strategy

A. Priorities for SMART Growth

Core Elements: Affiliates will aim to lay the foundation for future growth by focusing on excellence first, through improving existing service delivery execution to meet national standards. Expectations for growth in the number of children served will be secondary to: 1) quality service delivery, 2) independent financial management, and 3) alignment with reporting systems and the AARP Experience Corps brand. Affiliates will maintain a minimum, sustainable size in terms of both volunteer members and students served which will be outlined within individual project work plans.

Degrees of Latitude: To be determined by mutual agreement based upon the contexts of individual affiliate markets and potentially including districts' and schools' ability to pay.

Standardization Rationale: To provide a framework for excellent service delivery and in support of achieving the AARP Experience Corps vision and national goals.

National Support: The national office will facilitate the sharing of best practices and tactics between AARP Experience Corps branches and affiliates. Through project quality assurance monitoring, we will identify common project barriers and successes to further refine local and national growth strategies.

B. School Selection Criteria

1. District Selection

Core Elements: Affiliates will seek to serve districts displaying significant percentages of schools failing to meet Adequate Yearly Progress (AYP) (or other forthcoming federal quality metric), with preference given to districts with higher percentages of Title I schools serving predominantly underserved low-income communities and those districts who have failed to meet AYP for fewer years.

Degrees of Latitude: To be determined by mutual agreement based upon the contexts of individual affiliate markets, requests of district officials, and if necessary, the districts' and schools' ability to pay.

Standardization Rationale: Given that wealthier districts generally have access to additional resources and that chronic underperforming schools are targeted with additional state and federal resources for turn-around, early intervention in resource-disadvantaged districts with shorter negative track records best leverages AARP Experience Corps resources to maximize its impact.

National Support: The national office will provide guidance on district selection and will provide relationship coaching and strategy development with LEAs/SEAs/Principals to gain access to school systems.

2. School Selection

Core Elements: Within selected districts, affiliates will seek to serve public schools, including charter schools, failing to meet Adequate Yearly Progress (AYP) (or other forthcoming federal quality metric), with preference given to Title I schools serving predominantly underserved low-income communities and those public schools who have failed to meet AYP for fewer years.

Degrees of Latitude: To be determined by mutual agreement based upon the contexts of individual markets, potentially including districts' and schools' ability to pay.

Standardization Rationale: Given that chronic underperforming public schools are targeted with additional state and federal resources for turn-around, early intervention in public schools with shorter negative track records best leverages AARP Experience Corps resources to maximize its impact. Public

charter schools are a reasonable target for service delivery provided there is sufficient evidence of need for the AARP Experience Corps program.

National Support: The national office will provide guidance on district selection and will provide relationship coaching and strategy development with LEAs/SEAs/Principals to gain access to school systems.

3. Fee for Service

Core Elements: Affiliates are encouraged to increase their revenues by seeking a fee for service from school districts or individual schools when possible.

Degrees of Latitude: Affiliates may decide to approach schools that have the ability to pay a fee for service, but it is not a requirement when targeting schools to serve.

Standardization Rationale: To ensure a sustainable base of locally generated project income to support continued operations and growth.

National Support: The national office will provide guidance and support to affiliate in developing and implementing a strategy to increase fee for service revenue in order to ensure a sustainable base of locally generated project income.

C. Grade Selection Criteria

Core Elements: Within selected schools, affiliates will seek to serve the individual needs of the school system in the K-3 grade range, with preference given to starting in the earliest possible grade.

Degrees of Latitude: If a project is asked to serve 4th or 5th grade, they have the option to either serve those children or to stay within the K-3rd range. This decision should be made on a case by case basis depending on the need within the school and based on the reading level of the students when they are referred. Projects that are approached by schools asking that they *expand their service delivery* to 4th or 5th grade, must contact the national office with a compelling rationale, and be able to demonstrate both adequate project support and volunteer member capacity. Additionally, these projects should already be serving as many K-3rd grade classes as possible within these schools or during after school programs. Projects that are already serving grades 4th through 5th may continue to do so, provided they can present a compelling rationale and demonstrate adequate project and volunteer member capacity to foster the expansion of services beyond K-3rd grade students. No older grades should be served.

Standardization Rationale: The evidence shows that intervention at the earliest point possible in a student's literacy trajectory has the greatest academic impact, but this knowledge must be balanced with the inherent logistical challenges to executing Kindergarten interventions in many districts. Additionally, the learning requirements of older grades require new organizational capabilities not always in AARP Experience Corps's competencies.

National Support: The national office will provide relationship coaching and strategy development with LEAs/SEAs/principals to gain access to school systems.

D. Classroom and Student Selection Criteria

Core Elements: Within selected grades, affiliates will seek to serve the needs of classrooms and students identified by principals and teachers.

Degrees of Latitude: Volunteer members will focus on students with literacy intervention needs, not those flagged for disciplinary action or special education.

Standardization Rationale: Serving students with needs beyond basic literacy deficits often requires intervention by professional educators by law and falls outside the scope of AARP Experience Corps's core competencies.

National Support: As feasible, the national office will provide updated evidence-based research data to support appropriate student selection criteria.

Service Delivery

A. Content and Curricula

1. Subject Content

Core Elements: Affiliates will provide tutoring or academic mentoring focused primarily on supporting the five components of reading (phonemic awareness, phonics, vocabulary development, fluency, and reading comprehension), and in alignment with each school district's integration of the Common Core State Standards.

Degrees of Latitude: As part of supporting the five components of reading, volunteer members may use other subject (e.g. science or social studies) texts, provided the session remains primarily focused on literacy. Projects may provide limited support of math curricula with a compelling rationale and adequate project staffing infrastructure, volunteer member training capacity, and demonstrated volunteer member math competency. Additionally, while volunteer members must meet their minimum hourly requirement (see Volunteer Member Service Agreement section below), they may engage in additional school community building activities, provided these don't impede the ability to serve more students with the minimum dosage level of literacy intervention or could be construed as teachers' assistants or general classroom aides work. Specific grant-funded volunteer positions (e.g. AmeriCorps) may have additional guidelines that must be deferred to.

Standardization Rationale: While the national office understands that districts and schools are in high need of and seeking interventions across multiple subject areas, the current evidence base shows the efficacy of AARP Experience Corps as a reading literacy intervention model. Pending future research and positive findings for interventions in additional subjects, focusing on literacy is currently the most effective deployment of resources and positions the network for the greatest growth and impact potential.

National Support: The national office will provide trainings on executing AARP Experience Corps tutoring and academic mentoring models, as well as on-going research-supported best practice strategies and tips on both 1:1 literacy tutoring and mentoring, and classroom-based small group focus.

2. Curricula

Core Elements: Affiliates will support district-approved reading literacy curricula that is proven to support the five components of reading (phonemic awareness, phonics, vocabulary development, fluency, and reading comprehension), and aligns with the Common Core State Standards.

Degrees of Latitude: Dependent of grades served, the curricula mix, and focus of the five components of reading and common core state standards may vary.

Standardization Rationale: Following district-approved curricula ensures academic alignment with the schools. Using evidence-based curricula ensures student outcomes that align with national social impact goals.

National Support: The national office will provide standardized volunteer member training.

B. Service Intensity

1. Dosage Levels

One-to-One Tutoring Focus

Core Elements: Affiliates must move students towards improved academic performance by ensuring that each student served receives a minimum of thirty five sessions comprised of a minimum of thirty minutes of instructional time with an active volunteer member (see glossary for definitions of “instructional time” and “active volunteer member”), no less than twice per week. Students are expected to remain in the AARP Experience Corps program for the entire school year, unless there is evidence that the student requires professional intervention as determined by school district or school staff.

Degrees of Latitude: Projects should seek to create matches that last the entire school year. Once the minimum number of sessions has been reached (35), teachers and AARP Experience Corps staff may determine that the volunteer member should be matched with a new student, as long as there is enough time left in the year for the new student/volunteer member match to meet 35 times. Projects should create an internal cut-off date for matching students based on the last day of the school year to ensure a minimum of 35 sessions can be delivered. Projects that serve students in Kindergarten have the option of offering those students two 15 minute sessions per week.

Standardization Rationale: Evidence shows that AARP Experience Corps’ literacy intervention requires a minimum of 35 sessions to be successful. To ensure attainment of national impact goals, the national office highlights evidence-based curricula that require minimum dosage levels as a tipping point for successful literacy interventions.

National Support: The national office will provide updated, evidence-based dosage targets based on proven research, and will work with projects to move towards reaching targets as needed.

In-class Tutor Focus

Core Elements: Projects must ensure that each classroom served receives a minimum of 12 hours of instructional time per week by active in-class AARP Experience Corps volunteer members.

Degrees of Latitude: Per class dosages may exceed minimum, provided doing so does not prevent additional underserved classrooms from receiving the minimum dosage literacy intervention.

Standardization Rationale: Projects must ensure that volunteer members take a child-centered approach, based on teacher-identified needs of eligible students (see definition of “eligible student”).

National Support: The national office will provide updated, evidence-based dosage targets based on proven research, and will work with projects to move towards reaching targets as needed.

2. Volunteer Member-Student Ratio and Consistency

One-to-One Tutoring Focus

Core Elements: The 1:1 tutoring ratio is one active volunteer member to one student per 30 minute session. Volunteer members should be consistently paired with the same students for a minimum of two sessions per week.

Degrees of Latitude: Provisions may be made to provide substitutes during volunteer member absences. If scheduling conflicts prohibit one volunteer member from seeing the same student twice a week, two volunteer members may share tutoring responsibilities, provided that they develop a system for communicating and both volunteer members are able to attend monthly team meetings.

Standardization Rationale: The evidence-based research results support low ratios and consistent pairing of volunteer members with the same students as key success factors to developing the trusting relationships critical to successful literacy interventions.

National Support: The national office will provide updated, evidence-based dosage and ratio targets based on proven research, and will work with projects to move towards reaching targets as needed.

In-class Tutor Focus

Core Elements: Active volunteer members should consistently serve the same classroom every session. Small group in-class tutoring ratios should not exceed one active volunteer member to four students.

Degrees of Latitude: Provisions may be made to provide substitutes during volunteer member absences. If necessary to meet the dosage level of 12 hours per week, two volunteer members may split classroom assistance responsibilities. If directed by the teacher, volunteer members may work with small groups of 4+ students, provided that the volunteer member has been trained and is comfortable working with a larger group. Where students in small groups are being tracked individually for academic progress, the number of sessions each student attends will be tracked, using session logs, and the tutor will ensure that each student receives small group support at least once per week.

Standardization Rationale: The evidence-based research results support low ratios and volunteer member-student consistency as key success factors in successful literacy interventions.

National Support: The national office will provide updated, evidence-based dosage and ratio targets based on proven research and will work with projects to move towards reaching targets as needed.

Project Support

A. Volunteer Member Management

1. Volunteer Member Policies

Core Elements: Affiliates must have standardized volunteer member and project policies meeting standards set by the national office (e.g. background checks, civil behavior, crisis communication, volunteer members' citizenship status, file/record retention, indemnification/liability, and legal relationships).

Degrees of Latitude: Specific policy requirements will be determined by mutual agreement.

Standardization Rationale: To minimize financial, legal, and brand risks for the network.

National Support: National will provide sample policies and/or define minimum standards.

2. Volunteer Member Requirements

Core Elements: Affiliates will target potential volunteer members who are legal US residents, age 50+, have a GED/HS diploma, and have no sexual or violent criminal record, with special focus on recruiting volunteer members from neighborhoods near school sites.

Degrees of Latitude: Subject to local law. AmeriCorps volunteer members may be <50. On an individual basis, applicants with non-sexual or non-violent criminal records may be considered for volunteer member service (See AARP Experience Corps Background Check Policy).

Standardization Rationale: To minimize financial, legal, and brand risks for the network.

National Support: The national office will track societal and demographic trends of the aging US population, volunteerism, and education to provide current best practice strategies and tactics to network projects for volunteer member recruitment.

3. Volunteer Member Service Agreements

Core Elements: Volunteer members will sign a nationally-approved service agreement in which they commit to “active volunteer membership” in the AARP Experience Corps program. To be defined as an “active volunteer member” for the 1:1 model, volunteer members must commit to a daily minimum of 2.5 hours of instructional time for no less than two days per week, for a minimum total of five hours per week. To be defined as an “active volunteer member for the in-class model, volunteer members must commit to a weekly minimum of 4 instructional hours, with no less than one hour per day. In addition to instructional time commitments, volunteer members must also commit to volunteer member training minimums detailed in the “On-boarding and Training” section below.

Degrees of Latitude: None

Standardization Rationale: The evidence-based *Washington University Study on Experience Corps supports repeated face time and minimum dosage levels to achieve AARP Experience Corp’s social impact goals. Furthermore, requiring minimum service requirements minimizes the incidences of increased management costs incurred by episodic volunteers.

National Support: National will provide customizable templates for volunteer member service agreements, volunteer member tutor logs and volunteer member timesheets.

*Information on the Washington University study can be found on the Experience Corps website.

4. On-boarding and Training

Core Elements: New volunteer members are required to have a minimum of 25 training/learning hours throughout a service year. Returning volunteer members should complete at least 20 hours of training/learning.

The required activities for the minimum training/learning hours should include the following components:

- *Introduction* to AARP Experience Corps’s mission, vision, & brand; responsibilities of volunteer members; safety and risk mitigation; overview of the AARP Experience Corps tutoring and mentoring program; orientation to the local service site; in-take paperwork; and new members shadowing experienced volunteer members.
- *Basic/intermediate/advanced training* (as appropriate to volunteer member) across the following topics: literacy (including the five components of reading and Common Core State Standards), tutoring and mentoring techniques, child development, behavior management, and relationship building.
- *Regular In-service training:* Projects will provide volunteer members with on-going in-service trainings (minimum of 3x annually) that support primary service activity. Topics for in-service training may be selected from The Learning Experience CD-ROM or AARP EC Link. Projects are also required to have a minimum of one in-service training which focuses on a topic of interest identified by their corps.
- *Informal on-going training and/or peer learning:* Training calibration for volunteer members, i.e. AARP Experience Corps staff or *teacher coaching; peer shadowing;* and peer best practice sharing.
- *Leadership development training:* Projects will provide volunteer members with the opportunity for leadership development through: leadership and public speaking trainings; delivery of peer teaching; and/or opportunities for leadership positions.

Degrees of Latitude: Projects may develop or outsource training targeted at local need(s) with the appropriate Standardization Rationale. A project’s menu of training opportunities will vary based on primary service delivery activities, i.e. 1:1 vs. in-class and school curricula.

Standardization Rationale: To ensure a consistently well-trained and satisfied base of qualified volunteer members to support continued operations and growth.

National Support: The national office will disseminate core volunteer member training modules via “train the trainer” webinars, and in-person at the annual national meeting. The national office will also provide a training and technical assistance library via the EC Link.

5. Team Meetings

Core Elements: Projects will ensure that volunteer members attend a minimum of one in-person 30 minute team meeting monthly.

Degrees of Latitude: Projects may exceed the minimum number of team meetings per month and meeting settings may vary, including occasional conference calls.

Standardization Rationale: To facilitate peer networking (best practice sharing, etc.), increase volunteer management logistic coordination, to promote esprit de corps, and, as appropriate, serve as a vehicle for monthly in-service training.

National Support: The national office will support the facilitation of volunteer member team meetings by identifying relevant topics for discussion and trainings via the EC Link.

6. Volunteer Member Performance Management

Core Elements: Projects will utilize a nationally provided volunteer member progress review twice per year and conduct post-training surveys.

Degrees of Latitude: None

Standardization Rationale: To ensure a sustainable, well-managed base of volunteer members to support continued operations and growth.

National Support: The national office will provide projects with a volunteer member progress review template.

7. Volunteer Member Recognition

Core Elements: Projects will provide opportunities for volunteer member growth and at least one annual volunteer member-recognition event, as well as ongoing opportunities to express AARP Experience Corps appreciation of the service of its volunteer members. Volunteer member satisfaction will be measured annually through volunteer member satisfaction surveys and volunteer member return rates.

Degrees of Latitude: Projects may determine, based upon local context, whether or not to offer additional volunteer member appreciation events and/or incentives or awards to volunteer members.

Standardization Rationale: To ensure a sustainable and satisfied base of volunteer members to support continued operations and growth.

National Support: The national office will directly recognize volunteer members with thank you letters and cards several times per year, and will provide projects with a volunteer member satisfaction survey template and suggestions for volunteer member appreciation as gathered from other AARP Experience Corps projects.

B. Evaluation and Reporting

1. Program Data Collection and Reporting Processes

Core Elements: Affiliates will follow annual program evaluation and reporting processes and submit data in a format and timeline determined by the national office. Affiliates will comply with annual benchmarking

and quarterly reporting to the national office in accordance with the schedule detailed in their project work plan. Affiliates should also strive to collect individual standardized test data on students served from each school. If individualized data is unavailable, aggregate standardized test data of classrooms served is an acceptable alternative.

Degrees of Latitude: Affiliates are encouraged to collect city- or project-specific data for local grants or internal measurement, provided doing so does not interfere with national data collection priorities or schedules. Additionally, if standardized test data cannot be collected from schools, affiliate will work with the national office to ensure that relevant student data is gathered.

Standardization Rationale: To standardize data collection processes and streamline national reporting to allow for enhanced network learning, continuous service delivery improvement, timely and effective reporting to national funders, and real-time access into project-appropriate and national data.

National Support: The national office will conduct audits and provide feedback. It will develop and make available the National Program Database and survey tools to input and manage local data. The national office will continue to provide data processing, analysis, and reports on a schedule to-be-detailed in a reporting calendar.

2. External Research

Core Elements: Affiliates will participate in national research initiatives.

Degrees of Latitude: To be determined by mutual agreement.

Standardization Rationale: To provide a continually growing evidence base to inform program service delivery improvements and provide compelling material for marketing and communication content.

National Support: The national office will initiate a research agenda and provide opportunities for projects to participate in ongoing research initiatives.

C. Finance, Development, and Operations

1. Financial Management

Budget Preparation and Planning

Core Elements: Affiliates will provide annual fiscal budgets prior to the start of the affiliates' respective fiscal year. The budget will present the complete AARP Experience Corps project budget including revenues and fundraising forecasts in AARP Experience Corps format reports.

Degrees of Latitude: None

Standardization Rationale: To ensure an accurate accounting of cost per child as well as the overall financial health of each affiliate and the AARP Experience Corps network; to more accurately forecast network sustainability and growth; to provide affiliate with targeted growth and sustainability assistance; and to identify and disseminate best practices across the network.

National Support: The national office will provide financial reporting guidelines and templates to be used for financial reporting.

Financial Reporting

Core Elements: Affiliates will dedicate resources to ensure submission of accurate quarterly budget-to-actual reports and supporting documentation to the national office in accordance with AARP Experience Corps reporting requirements.

Degrees of Latitude: None.

Standardization Rationale: To coordinate timely and accurate compilations of the financial health of the affiliate and the Experience Corps network.

National Support: The national office will provide financial reporting guidelines and templates to be used for financial reporting.

Development/Fundraising Plan

Core Elements: Affiliates will work with the national office to develop a 2year local written fundraising plan aligned with national network goals consisting of diversified resources from school districts, government, private, and corporate sources.

Degrees of Latitude: To be determined by mutual agreement based upon local market context.

Standardization Rationale: To ensure a sustainable base of funding to support continued operations and growth.

National Support: The national office will identify opportunities to apply for funding that will benefit projects across the network. This includes federal, foundation, and corporate grants. The national office will provide a template for a 2 year fundraising plan.

2. Operations

Computer Hardware /Software Standards

Core Elements: Affiliates will use software and licensing capable of managing data stores and templates without alteration in the format and version provided by the national office.

Degrees of Latitude: None.

Standardization Rationale: To streamline national data synthesis efforts and network communications.

National Support: The national office will provide the appropriate templates, as well as a list of necessary software applications that best support our data collection requirements. National may provide software applications and/or licensing that supports data management standards.

Data entry, storage, and security protocols

Core Elements: Authorized and trained affiliate staff will enter relevant data into uniform AARP Experience Corps templates, the National Program Database, and other National- managed forms according to established reporting periods. Information must start to be entered within one week of collection, and data entry must be completed within thirty days. Affiliate will implement reasonable security measures to protect data collected from unauthorized access by any third party. Affiliate must also adopt an appropriate backup system and process to allow for data recovery in the event of a loss.

Degrees of Latitude: The security and backup protocols that are reasonable and appropriate will depend on a number of factors, including the nature of data collected, the size of the organization, and the speed with which the Affiliate can enter data into the National Program Database. Both electronic and paper data should be backed up regularly, to minimize so far as feasible the potential loss due to unexpected circumstances. Backup plans should include off-site storage where appropriate. Security plans also will vary by organizational circumstances, but in all cases any records that include personal identifying information for individuals must be protected by at least one level of security in addition to that for the general office (such as locks on the doors or key card access for the building). Examples of additional security measures could include an office safe, a locked file cabinet, or password protection on electronic files and for computer system access.

Standardization Rationale: To ensure network-wide data security, accurate reporting, and a sustainable program service delivery.

National Support: The national office will provide training and technical assistance on AARP Experience Corps-issued templates, forms and databases. National will conduct routine maintenance on AARP Experience Corps-issued templates and/or National-managed data systems with appropriate notification to minimize delays in work flows. The national office will consult with affiliates regarding data security and backup to provide suggestions and analysis of plans upon request.

3. Risk Management

Privacy Waiver and Release Forms

Core Elements: All AARP Experience Corps sites will secure signatures from participants on any waiver, release, or consent form required by the national office prior to allowing them to participate in any AARP Experience Corps program for which such a form is required.

Degrees of Latitude: None.

Standardization Rationale: To minimize financial, legal, and brand risks for the network.

National Support: The national office will provide sample release forms.

D. Recruitment, Marketing, and Communications

1. Volunteer Member Recruitment and Management

Recruitment Goals

Core Elements: All programs will work with the national office to develop goals for volunteer member recruitment. Affiliates will develop a written recruitment plan aligned with national goals to engage adults age 50+ in service to bridge the achievement gap in education.

Degrees of Latitude: To be determined by mutual agreement based upon local market context.

Standardization Rationale: To ensure a sustainable base of volunteer members to support continued operations and potential growth.

National Support: The national office will provide a template for a communications plan, which includes specific recruitment tactics, as well as guidance on recruiting strategy and site-based assistance as feasible. The national office will also provide a template for the recruitment plan.

Recruitment Messaging

Core Elements: Recruitment marketing materials will be consistent with national brand standards (see Marketing section), but should reflect local market context.

Degrees of Latitude: To be determined by mutual agreement based upon local market context.

Standardization Rationale: To ensure a sustainable and consistent base of qualified volunteer members to support continued operations and growth.

National Support: The national office will provide branding, messaging, best practices information, and (as feasible) marketing materials to support local recruitment efforts.

Screening

Core Elements: Affiliates will respond to prospective volunteer member inquiries in a timely manner, track the source of all inquiries, and report recruitment outcomes to national (# of inquiries, # enrolled, # active). Projects will provide volunteer members with a volunteer member position description and service agreement which they must sign. In addition to conducting rigorous interviews and reference checks, projects must comply with the AARP Experience Corps Background Check Policy, and ensure completion of required paperwork prior to enrolling volunteer members.

Degrees of Latitude: None

Standardization Rationale: To minimize financial, legal, and brand risks for the network and ensure a strong and growing pipeline of qualified volunteer members.

National Support: The national office will provide position description templates to projects, along with recruiting and screening best practices gathered from the network. The national office will also provide customizable volunteer member service agreements to projects.

2. Marketing and Communications

Communications and Recruitment Strategy

Core Elements: Projects will work with the national office to develop a communications plan which will include recruitment tactics and is aligned with national goals, targeting local, general, and education media outlets.

Degrees of Latitude: To be determined by mutual agreement based upon local market context

Standardization Rationale: To support local and national marketing efforts to communicate AARP Experience Corps as a credible academic intervention and keep the organization “top of mind” with diverse audiences such as government, research, education, business, volunteers, the general public, and the media.

National Support: The national office will craft and share key message points for use in marketing and communications materials. The national office will also provide a communications planning template with suggested recruiting tactics. National will solicit regular project input for national communications and recruitment tactics and provide training and technical assistance on local strategy as feasible.

E. Advocacy, Policy, and School System Relationship Management

1. School System Relationship Management

Local Education Agency (LEA) Relations

Core Elements: Projects should educate, establish and maintain relationships with top-level (Superintendent, Chief Academic Officer, District Reading Specialist, Principals, etc.) LEA officials.

Relationship building includes office visits, site visits, and at least one invitational event per year.

Degrees of Latitude: To be determined by mutual agreement based upon local market context.

Standardization Rationale: To secure partnerships with schools, access a range of local support (including sustainable funding streams from fee for service), and gain a deep level of trust and respect with districts as an integral educational intervention for students that leverages the growing population of older Americans.

National Support: The national office will assist projects in the development of an LEA relationship strategy.

State Education Agency (SEAs) Relations

Core Elements: Projects will educate (and, as needed, engage with) top-level SEA officials (State Secretary of DOE, etc) of AARP Experience Corps’s story, including evidence-based research studies, opportunities to sign on to grant applications, etc.

Degrees of Latitude: To be determined by mutual agreement based upon local market context.

Standardization Rationale: To secure state funding and federal funding flowing through state offices to ensure a sustainable revenue mix for projects.

National Support: The national office will assist projects in the development of an SEA relationship strategy.

2. Advocacy and Policy

Federal, Local Political and Civic Leaders

Core Elements: Projects will identify and educate top-level federal and local political and civic leaders (Members of Congress, governors, state legislators, mayor, local legislators, school boards, influential religious leaders, etc.) about their work within their communities.

Degrees of Latitude: To be determined by mutual agreement based upon local market context.

Standardization Rationale: To gain visibility and financial and political support for programs with key local influencers and community volunteer members.

National Support: National will share network best practices and supporting materials as feasible.

Glossary

Core Element: Those parts of the AARP Experience Corps operating model that play a significant role in its successful execution and measured outcomes. The desired state for the AARP Experience Corps network.

“Active” Volunteer member: To be defined as an “active volunteer member” for the 1:1 model, volunteers must commit to a daily minimum of 2.5 hours for no less than two days per week, for a minimum total of five hours per week. To be defined as an “active volunteer member” for the in-class model, volunteers must commit a weekly minimum of 4 hours, with no less than one hour per day. Active volunteer members are expected to serve for an entire school year. Active volunteer members can be stipended or unstipended and must have a signed volunteer member agreement and have fulfilled all program membership requirements.

Dosage: The number and duration of tutoring sessions per student during an average school week.

English-language learners: Those students who do not speak English as their native language.

Host: A local nonprofit or government agency that administers and supports the local execution of the AARP Experience Corps program.

In-Class Model: A service delivery methodology that places AARP Experience Corps volunteer members in the classroom as tutors and academic mentors to deliver targeted literacy interventions to groups of 1-4 children at a time for an entire school year.

Instructional Time: The core of a volunteer member-student session dedicated exclusively to tutoring and mentoring; distinct from volunteer member training time, or preparation time or small-talk that often brackets volunteer member-student interaction.

Local Education Association (LEA): An educational agency at the local level that exists primarily to operate schools or to contract for educational services, including primary and secondary public and private schools.

One-to-One Model: A service delivery methodology that places AARP Experience Corps volunteer members as tutors and academic mentors in a consistent 1:1 volunteer member-to-student ratio for a defined number of literacy sessions.

Project - AARP Experience Corps activities conducted by affiliates within a distinct geographic region, e.g., the AARP Experience Corps project in Cleveland.

Session: The smallest unit of instructional interaction between AARP Experience Corps volunteer member and student.

State Education Association (SEA) - The state-level government agency within each state responsible for providing information, resources, and technical assistance on educational matters to schools and residents.

Tutor /Academic Mentor: An AARP Experience Corps volunteer member who provides literacy instruction and academic support to eligible students and develops impactful relationships with them to affect positive academic and behavioral outcomes.