AARP Foundation Experience Corps
Standards
Adopted May 2014
Updated June 2016

OUR MISSION

Experience Corps engages highly trained adults 50+ who help children attain literacy proficiency by the end of 3rd grade so that children succeed and older adults thrive.

OUR VISION

A just society where all children have an equal opportunity to succeed and older adults are valued.

OUR STRATEGIC FOCUS

To engage 50-plus adults as tutors and mentors to produce outstanding literacy results for children in grades K-3.

The AARP Foundation Experience Corps standards are based on the Johns Hopkins University and Washington University in St. Louis research on the Experience Corps program, and informed by network colleagues who understand the day-to-day challenges and opportunities of running Experience Corps programs.

The goal of these standards is to continue to:

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

AARP FOUNDATION EXPERIENCE CORPS STANDARDS

Standard	Indicators/Benchmarks	Intent/Rationale
BUSINESS OPERATIONS		
A. Strategic and Program Planning		
1. Branches and affiliates will have a multi-year strategic plan, which will include a growth strategy detailing the goals, timelines, measures of success and strategies for implementing the EC program.	Indicator: • Branches will have a strategic plan that aligns with the greater AARP Foundation Experience Corps strategic plan and includes growth goals. • Affiliate host agencies will have a multi-year strategic plan that includes fundraising goals and a growth strategy (if possible) for the Experience Corps program.	Strategic plans serve the purpose of helping an organization function at its highest level by building a competitive advantage, communicating a strategy to staff, prioritizing financial needs, and providing focus and direction to move from plan to action.
2. Branches and affiliates will create an annual operations plan that outlines their growth strategy for the year, and indicates the targets for volunteers recruited, districts, schools, classrooms, and students served.	Indicator: • Annual Operations Plan (may use a template provided by the National Office)	Operations plans serve as a resource to sites when setting annual goals and targets related to specific outputs and outcomes. Templates are collected from sites in the beginning of the school year and reviewed mid-year and at the end of the school year. These plans also serve as a tool to track outputs and outcomes longitudinally.
3. Branches and Affiliates will collaborate with the National Office (POC) to create and implement an annual technical assistance plan which indicates priority areas for assistance. The plan will outline the TA requested, those responsible for implementation, a timeline, and measures of success.	Indicator: • Annual technical assistance plan.	Technical assistance plans allow the National Office to provide targeted support to local Branches and Affiliates. These plans stem from on-going communication and collaboration throughout the year, as well as results from local program self-assessments.

B. 1. District, School, Grade, Classroom and Student Selection Criteria		
a. District selection: Branches and Affiliates will serve in districts that include low performing schools and that fall within their licensed territory or service area.	Indicators: • A State or city definition of "low performing" and supporting documentation that districts being served fall within that definition. • High percentage of schools compared to other districts, or relative to surrounding districts.	Experience Corps can maximize impact by providing early intervention in resource-disadvantaged districts that include low performing schools.
b. School selection: Within selected districts, Branches and Affiliates will serve public schools, including charter schools that are low performing as defined by a state, city or district, quality metric, located in predominantly underserved low-income communities.	Indicator: • A State, city, or district definition of "low performing" and supporting documentation that schools being served fall within that definition. • Sites may choose which definition they are using when identifying schools to serve. Definition must be indicated as evidence of school eligibility.	Experience Corps can maximize impact by providing early intervention in resource-disadvantaged districts that include low performing schools.
c. Grade selection: Within selected schools, Branches and Affiliates will meet the needs of grades K-3 before expanding to other grades.	Benchmark: EC Tutors are in at least 80 percent of all K-3 classrooms in school before serving other grades. Indicators: • The number of K-3 classrooms served; • the total number of K-3 classroms in the school;	The evidence shows that literacy intervention at the earliest point possible in a student's academic life has the greatest impact. EC is focused on K-3 with the recognition that working in other grades may also impact literacy gains.

	• the percentage calculated meets 80% benchmark.	
d. Classroom selection: Within selected grades, Branches and Affiliates will serve the needs of classrooms and students identified by relevant school staff and administrators.	Indicator: • Referral form and/or MOU stating which and how many classrooms will be served within each school.	Principals, teachers, literacy specialists, etc. understand and can assess the specific needs of the classrooms within their schools.
e. Student Selection: Within selected classrooms, Branches and Affiliates will primarily serve those students identified as being below grade level by teacher assessments.	Benchmark • 80 percent of students served are below grade level on one or more literacy indicators. Indicator: • Student assessments, pre-surveys or other indicators of student reading level.	Teachers, literacy specialists, etc. understand and can assess the specific needs of the students within their classrooms.
B. 2. After School Partner, and Student Selection Criteria		
a. After school partner selection: Branches and Affiliates will select after school partners that are community based, and serve a population of students from low performing schools. The program should be located within the approved licensed territory. If the after school program is taking place at a school, the above School Selection criteria will apply.	Indicators: • Partners serve the community within the licensed territory. • Partners serve a population of students from low performing schools.	
b. Student selection: Branches and Affiliates will primarily serve students identified as being below grade level by standardized	Benchmark: • 80 percent of students served are below grade level on one	

assessments.	or more literacy indicators. Indicator: • Approved standardized assessment data indicating student is below grade level.	
C. Data Collection, Evaluation and Reporting		
1. Annual and ongoing data collection and reporting will be completed in a format and timeline determined by the national office to ensure data quality and integrity. **2.** Standardized assessments for after-school should be used to determine a student's reading proficiency upon entry into the afterschool program and can be administered multiple times per year, with at least one mid-point and final assessment. The assessment must align with the curriculum being used. **3.** An Experience Corps staff person from each after-school program must be designated, who is responsible for collecting and analyzing the standardized assessment data.	Indicators: • National Surveys • Data from approved assessment (for after-school programs). • Salesforce Records • Name of designated staff person (for after-school) Benchmarks: • All national surveys and Salesforce records due to national office by agreed upon date • 80% response rate as compared with total number or students, classrooms, and volunteers. • Infrequent missing data	Data collection and reporting allows continuous quality improvement, network wide learning, and real-time assessment of programs.
D. Finance, Development and Operations		
1. Financial management: Branches and affiliates will maintain and demonstrate the financial	Indicators:	Designating a POC and communication with the National Office will support the compilation of a timely

health of the Experience Corps program by, designating a staff member responsible for financial reporting and for communicating with the national office on financial matters; meeting all financial reporting and audit requirements established by the national office (affiliates only); and maintaining and implementing sound financial policies and procedures that follow best practice standards.	• Name of financial staff designee • Financial Management Survey updated on an annual basis	and accurate accounting of the overall financial health of the Experience Corps programs.
2. Resource development: Branches and affiliates will demonstrate the capacity for a resource development function appropriate to sustaining the organization by, designating a person responsible for overseeing an ongoing resource development function and creating and maintaining a resource development plan that includes seeking diversified funding sources such as government, foundations, corporations, individuals, school systems and events.	Indicators: • Name of designee • Documentation of donor pipeline activity • Completed resource development plan	To ensure a sustainable base of funding to support continued operations and growth.
3. Risk management: Branches and affiliates will apply and maintain applicable and effective security controls for managing risk by, designating an organizational representative-	Indicators: • Name of designee	To minimize financial, legal, and brand risks for the network.

staff, board member, or committee member- who is responsible for ensuring that risk management is a priority; and maintaining and following recommended risk management policies and procedures.	• Written risk management policies and procedures, including a system of accountability, that follow best practices	
E. Marketing and Communications		
1. Branches and Affiliates have a communications plan, developed collaboratively with the national office, which includes recruitment tactics as well as at least two prospective media outreach opportunities and is aligned with national goals, targeting local, general, and education media outlets.	Indicator: • Communications plan	Ensure consistent mission and vision execution across Experience Corps's national network.
2. Volunteer Recruitment Messaging: Recruitment marketing materials will be consistent with national brand standards and may reflect local market context.	Indicator: • Sample of marketing materials	Ensure consistent mission and vision execution across Experience Corps's national network.
3. When capturing third-party statements for use on any communications channels from volunteers, students, parents, teachers, school personnel or other third party validators through any means, including but not limited to: photographing, videotaping or written word; a signed media release must be on file and available for the	Indicator: • Signed AARP EC media release forms	To minimize legal risks for the Experience Corps network, and to ensure that we have the proper permissions to use the stories, quotes, videos, and photos.

national office.		
F. School System Relationship Management, and Advocacy		
1. School System Relationship Management: Branches and Affiliates should educate, establish and maintain relationships with top-level (Superintendent, Chief Academic Officer, District Reading Specialist, Principals, etc.) school district officials and/or SEA officials. Relationship building includes office visits, site visits, and at least one invitational event per year.	Indicator: • Documentation of regular meetings with high level school district and/or SEA officials. Benchmarks: • Office visits, site visits and at least one invitational per year	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.
2. Advocacy: Branches and Affiliates are encouraged to 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.	Indicator: • Descriptions of advocacy activities that benefit Experience Corps and are approved by the National Office.	Advocacy helps gain visibility, and, support for our programs among local influencers and community members.
PROGRAM		
A. Content and Curricula		
1. Subject Content: Branch and Affiliate tutors will	Indicator:	Tutoring will align with existing district and individual

provide tutoring focused primarily on supporting the five components of reading (phonemic awareness, phonics, vocabulary development, fluency, and reading comprehension), in alignment with each school district's integration of the Common Core State Standards.	• Volunteer training agendas demonstrating emphasis on this content. Evidence that all volunteer tutors have received training and support to focus on this content.	school reading programs for K-3 students. This should include instruction, curriculum, and assessment on the five components of reading.
2. Curricula: All curricula brought into a school by a branch or affiliate program must be approved by the school and align with the Common Core State Standards. Curricula for after-school: Curricula being used in an after school partner program must align with the Common Core State Standards and/or the curriculum being used in the schools, and be approved by the National Office. If the after school program is taking place within a school, the above Curricula standard will apply.	Indicator: • Documentation indicating approval by the school of curriculum if not provided by school/classroom teacher. • Documentation of approval by National Office.	Following district-approved curricula ensures academic alignment with the schools.
B. Sustained Tutoring Strategies		
Sustained tutoring: Tutors will provide sustained tutoring to students identified as being below grade level in one or more of the foundational literacy skills, or overall reading. These students should have an attainment goal established by relevant school staff or administrators (teacher, ed director, literacy specialist, liaison). Students being served after-school, via a partner		Evidence shows that K-3 students make the greatest literacy gains when supported by a sustained intervention which utilizes either a 1:1 or small group model. Movement towards a more sustained model allows us to achieve the highest outcomes possible. Program sites established prior to 2014 were allowed to

program that is not a school, should be below grade level in one or more of the foundational literacy skills, or overall reading, as identified through approved standardized assessment data. Program sites established in 2014 or later will implement a sustained tutoring model for grades K to 3, via one-to-one or small group in which a minimum of 80% of volunteer tutor hours are devoted to sustained tutoring and a maximum of 20% of volunteer tutor hours are devoted to literacy assistance. Program sites established prior to 2014 will follow AARP EC program implementation guidelines established for existing sites. 100% of students being served in after-school should receive sustained tutoring.		implement both the sustained tutoring, and literacy assistance models without tracking tutor time spent on each intervention. To achieve the highest outcomes possible, we are now requiring a 50/50 ratio of sustained tutoring to literacy assistance which is more realistically achievable for sites that have been operating for many years.
1. **One-to-one sustained tutoring** involves one tutor matched with one student who remain together for a sustained period throughout the school year, or throughout the course of the after-school program. 2. **Small group sustained tutoring** involves one tutor matched with a group of up to 4 students. The group remains together for a sustained period throughout the school year, or throughout the course of the after-school program. Individual students will have the opportunity to move to other groups as they progress.	Indicators: • Salesforce report from site or from annual data reports indicating: • % of tutoring hours devoted to sustained tutoring • # of sessions per week for sustained students • Average session length • Range of # of sessions provided • Approved standardized assessment data (for after-school). Benchmarks:	

	• Minimum of 80% of volunteer tutor time for new sites; Existing sites follow implementation guidelines. • Minimum of two sessions per week • 20-40 minutes per session dependent on age and/or need of student • For small groups, minimum of 2 and no more than 4 students • Minimum of 35 sessions or student assessment results showing student is at grade level or above.	
C. Literacy Assistance Tutoring Strategy		
Literacy Assistance Tutoring: Tutors provide support to teachers to reinforce literacy skills or concepts introduced in daily lessons. The teacher assigns the tutor to work with a small group, individual student, or an entire class while the teacher works with other students in the classroom. Literacy assistance is employed to meet a specific lesson-related goal, rather than individual student goals. Tracking individual student progress for classroom literacy assistance is not required. Literacy assistance may also include other activities tied to improved literacy outcomes.	Indicator: • Salesforce report from site or from annual data reports indicating: • % of tutoring hours devoted to LA • Observation forms • Evidence supporting the link between the literacy assistance strategy or related initiative (such as attendance) and improved literacy performance. Benchmark: • For new sites, a maximum of 20% of volunteer tutor time devoted to literacy assistance tutoring. Existing sites follow implementation guidelines.	Literacy assistance allows tutors to support an entire classroom by reinforcing teachers' lessons. The literacy assistance model should be implemented with consistency and with focus on literacy and literacy related activities. To achieve the highest literacy outcomes, we have established an 80/20 ratio of volunteer hours of sustained tutoring to literacy assistance for new program sites. A 50/50 ratio of sustained tutoring to literacy assistance is more realistically achievable for sites that have been operating for many years.

D. Volunteer Recruitment, Training and Management		
1. Volunteer Management		
Branches must follow volunteer policies established by the national office. **Affiliates** must follow volunteer policies meeting standards set by the national office. (Please refer to the exhibits in the Affiliate Agreement for all policies)	Indicator: • Approved documentation for each Volunteer Tutor resides in volunteer files. Signed and executed Affiliate Agreement acknowledging all policies (exhibits) are in place.	Volunteer management policies must be in place to ensure the proper procedures are followed to reduce any legal, financial or brand risks.
a. Branches and Affiliates will target potential volunteer tutors who are age 50+, have a GED/HS diploma, and do not have a criminal background that excludes the applicant from the program per the AARP EC Background Check policy.	Indicator: • Documentation of passed background check, indication on application of high school graduation or GED, and age 50+ for each Volunteer Tutor	Our organization consists of volunteers aged 50+ who tutor students in reading, and therefore must have a high school diploma or GED and be cleared through a criminal background check.
b. Volunteer Service Agreements: Branch and Affiliate volunteer tutors will sign a service agreement in which they commit to "active volunteer membership" in the AARP Experience Corps program. In addition to instructional time commitments, volunteer tutors must also commit to training minimums detailed in the "On-boarding and Training" section below.	Indicator: • Signed service agreement for each Volunteer Tutor or other documentation that shows active volunteer commitment.	Volunteer service agreements outline program policies, and procedures, and ensure the commitment of one year of tutoring.
c. Branches and Affiliates will offer monthly team meetings which volunteer members should regularly attend.	Indicator: • Monthly team meeting agendas and attendance roster	Team meetings promote a sense of camaraderie among tutors, and should be used to share best practices, and for continuous training.

d. Branches and Affiliates will utilize a volunteer tutor progress review twice per year.	Indicators: • Two progress reviews and training evaluations.	Progress reviews help ensure a sustainable, well-managed base of tutors to support continued operations and growth.
e. Branches and Affiliates will have at least one annual volunteer member-recognition event.	Indicator: • Recognition agenda/program	Volunteer recognition helps to ensure a sustainable and satisfied base of tutors.
2. Volunteer Recruitment		
a. Branches and affiliates will develop a recruitment plan aligned with national goals to engage adults age 50+ in service, placing a priority on recruiting volunteer tutors from neighborhoods near school, and after-school sites. Plans will include a method for tracking volunteer inquiries.	Indicators: • Recruitment Plan • Recruitment process documentation	Recruitment plans are a best practice of volunteer based programs, and help to ensure the right number of volunteers are recruited and retained. A recruitment plan should provide program sites with a strategy for recruiting volunteers, which includes realistic goals and targets. Response times to prospective volunteers should be fast to ensure they are retained.
b. Volunteer tutors will be provided with a position description.	Indicator: • Volunteer Position Description	Position descriptions clearly outline the responsibilities of volunteers and are a part of good volunteer management.
3. Volunteer Training		
a. Volunteer tutors receive a combination of pre-service and ongoing training, over the course of the year. b. Volunteers placed in after-school must be trained on properly implementing the approved curriculum; and if applicable,	Indicators: • Copies of training agendas and curriculum that address at a minimum: common core if applicable, five areas of literacy/ reading, and student/classroom management. • Attendance logs	Training volunteers before they enter a school, prepares them to tutor students. On-going training throughout the year ensures that our tutors are developing, continuing to learn, and sharpen the skills they have already acquired. Allowing volunteers to provide feedback on the

must be trained on administering the approved assessments. c. Volunteers will be provided with training evaluations at the conclusion of all trainings	• Copies of training evaluation forms Benchmarks: • Minimum of 25 hrs of training over the course of the year for new volunteers • Minimum of 20 hrs of training over the course of the year for returning volunteers	trainings they receive ensures that we are providing high quality, effective training which impacts our outcomes with students.

Tutoring Strategy Guidelines

Adopted May 2014

AARP Foundation Experience Corps has adopted research-based guidelines that set targets for the appropriate balance between the primary tutoring strategies—sustained tutoring in a 1:1 or small group setting and literacy assistance in a whole class, small group or 1:1 setting. The primary focus on sustained tutoring mirrors the research on the impact of this strategy on literacy outcomes and the assistance to RtI Tier 2 students this provides, while also recognizing the value-added contribution literacy assistance. The guidelines distinguish between existing sites, established prior to 2014 and sites formed in 2014 or later, giving existing sites aspirational targets. Guidelines for an optimal combination of sustained tutoring and literacy assistance are detailed below.

For affiliates/sites forming in 2014 or later:

- A minimum of 80% and up to 100% of volunteer tutor hours will be devoted to Sustained Tutoring, which includes one-to-one and small group work. The 80 percent minimum threshold should be considered an aggregate across all volunteers for the site. The remainder of students (up to 20%) can receive Literacy Assistance either in the classroom or through an approved literacy-related intervention.

For sites formed prior to 2014

- Sites that currently devote *less than* 50 percent of their total volunteer hours to Sustained Tutoring will at a minimum, maintain 2012-2013 levels of Sustained Tutoring

- Sites that currently devote 50 percent or more of their volunteer time to Sustained Tutoring will not reduce this percentage below 50 percent

- All sites will have access to technical assistance and incentives to improve any area of the implementation model (including increasing Sustained Tutoring) as national office capacity to provide this assistance grows.

Experience Corps Quality Assurance System
Overall Framework/Policies

I. Participation in the Quality Assurance System is required for membership in the AARP Foundation Experience Corps National Network.

II. The Network Impact Council, working jointly with EC leadership, will determine a "launch" date for the system, once components have been designed and when possible, piloted.

III. Existing branches and affiliates will have three years from the official launch date to complete activities stipulated in annual technical assistance plans for complying with all EC standards and request a National Standards Compliance Review.

IV. Newly forming EC organizations will have three years from the date from which they begin serving students in schools to request a National Standards Compliance Review.

V. All sites will have one year from date of request to complete the National Standards Compliance Review.

VI. A six-member Oversight Committee will be convened with responsibility for overseeing the QAS overall and making certification decisions.

VII. The Oversight Committee can grant extensions to EC programs that are making progress towards meeting the standards but may require more time to do so.

VIII. Following the National Standards Compliance Review and confirmation from the Oversight Committee that an EC program has met all of the standards, the program will be designated as a *Certified Experience Corps Program of Excellence*. If, in the Oversight Committee's judgement, the applicant can complete an action plan to be in full compliance within 90 days, the program will be designated as a *Provisionally Certified EC Program of Excellence*. Provisional will be removed from the designation when evidence indicating remaining standards have been met is received and verified by the Oversight Committee. If, in the opinion of the Oversight Committee, an action plan will take substantially longer than 90 days to complete, they can decide opt for a *deferred decision* and revisit the application when documentation is supplied, based on a new action plan and timeline implemented with the FS POC.

IX. Certified EC Programs of Excellence will continue to complete annual self-assessments and will enact annual work plans to address any standards that have fallen out of compliance. These programs will apply for a re-review every five years unless the Oversight Committee identifies situations that may require an earlier review.

Flow Chart of EC Quality Assurance System

Self Assessment/TA Cycle

The following steps are repeated annually with the goal of moving on to the next phase, requesting an exrernal National Standards Compliance Review within three years. Current branches/affiliates must request this review within **three years** of the official process start date (TBD), and new programs must request this review within **three years** of beginning to serve students.

Step 1: EC Branch/affiliate completes EC Standards Self-Assessment, documenting status of compliance with all Business Operations and Program Standards

Step 2: Field Services Point of Contact conducts verification review of Self-Assessment.

Step 3: EC Branch/affiliate works jointly with Field Services POC to identify high priority areas for improvement and create a technical assistance plan.

Step 4: The TA plan is signed by the host agency director/POC, with benchmarks and accountability for achieving agreed upon results.

Step 5: Field Services POC conducts a review at the end of the year to determine progress relative to the TA plan.

National Standards Verification Review

This internal verification review by the Field Services team must take place within **two months** of the request.

Step 1: Branch/affiliate that has determined it meets all the standards submits a request to Field Services for a National Standards Verification Review.

Step 2: Field Services conducts a Verification Review to determine whether the Branch/Affiliate has achieved all benchmarks for the EC Standards. Review is based on a combination of distance and onsite data.

Step 3: A new workplan with associated technical assistance and a timeline is created and implemented for any standards deemed by Field Services as not yet meeting benchmarks/indicators. If none, skip to step 4.

Step 4: Field Services affirms that all standards are met.

Step 5: The Branch/Affiliate submits a Request for a National Standards Compliance Review to the Quality Assurance System Oversight Committee. The request is signed by both the EC project director and the host agency representative, indicating that the branch/affiliate has adequately addressed all EC Standards and is committed to the national review process.

National Standards Compliance Review

The Oversight Committee has 60 days from the date of request to form a review committee and schedule the review. The review must take place within 90 days of the request. Review team members will submit a final report to the Oversight committee within two weeks of the on-site review. Once received, the report will be considered by the Oversight Committee at its next scheduled meeting.

Step 1: The Quality Assurance System Oversight Committee acknowledges receipt of the Branch/affiliate request. **Within 60 days**, the Oversight Committee establishes and communicates a timeline for the review and forms a 3 member National Standards Compliance Review Team and requests all documentation.

Step 2: The Review Team conducts a distance review of all required documents and Salesforce data for compliance with standards. <u>If during this review it is determined that the affiliate does not have adequate documentation or data the branch/affiliate is given the option of submitting the documentation within the existing timeline or requesting an extension of the review schedule. The POC is notified at this point and may provide additional assistance to the program.</u>

Step 3: Following a successful distance review one or more members of the Review Team conducts a 2-3 day on-site visit. The visit includes interviews of key stakeholders and observations at selected schools.

Step 4: Following the onsite visit the Review Team considers all information from the distance review and the on-site visit to make compliance recommendations for all Business Operations and Program Standards and documents them, along with supporting comments, on the report template (To be designed).

Step 6: The Review Team compiles all information from the review to create a final report. The report documents the compliance recommendation for each standard, citing evidence for any standards not met and includes commendations and recommendation as appropriate.

Step 7: The Quality Assurance System Oversight Committee reviews the report at periodic meetings. There are three possible results for the branch/affiliate from the Oversight Committee's review of the Review Team reports.

1. *Certified EC Program of Excellence*: the report indicates that the branch/affiliate has successfully met all the standards and the Oversight Committee agrees with the report findings.
2. *Provisionally Certified EC Program of Excellence:* the review team documents the branch/affiliate has not met all the standards but the Oversight Committee determines that the unmet standards can be achieved in a period of 90 days or less (TBD). At its discretion, the Oversight Committee may grant an extension beyond 90 days to accommodate steps that are dependent on the time of year. The branch/affiliate responds with an action plan and sends documentation to the Oversight Committee when the actions have been successfully implemented. At that time, the Oversight Committee may award certification as an EC Program of Excellence.
3. *Deferred Decision:* the review team documents unmet standards that, in the opinion of the Oversight Committee, require an action plan that will take substantially longer than 90 days to complete, the Oversight Committee can decide to defer a decision until new documentation can be provided based on results of a new action plan and timeline with the Field Services POC.

Re-Reviews

Step 1: Certified branches/affiliates will continue to do annual self assessments, highlighting any areas of concern relative to the standards and developing a workplan with Field Services to address them. In the event all standards are still being met, a workplan for continuous improvement will be created.

Step 2: Certified branches/affiliates will be required to have a new National Standards Compliance Review every 5 years or as determined by the Oversight Committee based on need.

Appeals Procedure

Step 1: The Field Services POC or host agency of a branch/affiliate that is not satisfied with the **final** decision of the Oversight Committee, may file an appeal with Appeals committee along with documentation supporting the basis of the appeal.

Step 2: The Appeals committee will meet within 30 days of receiving the appeal and may affirm, overrule, or modify the decision of the Oversight Committee. That decision is final.

Financial Management Survey
For AARP Foundation Experience Corps Projects
2016-2017

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

		Yes	No	Comments
1.	Organization has written financial management policies, including, but not limited to:			
	Internal Controls			
	Billing Procedures			
	Personnel Policies			
	Accounting Procedures Manual			
	Organization has a written and updated chart of accounts showing what line categories and sub-categories are in use and how they coordinate with the agency's reporting requirements.			
	Procurement Policy (Federal compliant)			
	Allocation Methodology			
2.	Is the organization required to have an independent audit?			
3.	Is the organization required to have a federal grant audit as outlined in 2 CFR 200 Subpart F? (Federal law requires all nonprofit organizations to have an audit as prescribed by Subpart F whenever the organization expends $750,000 or more in federal funding.)			
4.	Is the audit available for the most recent fiscal year?			

5.	The individuals responsible for the agency's financial records are sufficiently experienced and trained for the task.			
6.	Board members are insured against liability.			
7.	There is a budget for each program representing a comparative budget and actual revenues and expenses.			
9.	Organization's financial data is sufficiently accurate and timely (current within 30 days) to be used for planning, monitoring, and decision-making purposes.			
10.	Organization's financial reports contain narrative information needed to support both decision-making and authorization processes.			
11.	The organization's financial reports are GAAP compliant and meet its funding sources requirements.			

		Yes	No	Comments
12.	The financial records filing system is separated by each accounting function and includes supporting documentation and authorization for each transaction (e.g., receipts, forms, and invoices, disbursement records, pay reports).			
13.	The organization's cash disbursements are supported by adequate documentation.			
14.	The organization has an up-to-date journal system summarizing each month's transactions, including, but not limited to the following:			
	General Ledger			
	General Journal			
	Cash Receipts Journal			
	Cash Disbursements Journal			
	Accounts Receivable Ledger			
	Accounts Payable Ledger			
	Supporting Allocation schedules if not processed through Accounting system			
15.	Organization tracks each major grant or contract; each can be clearly identified and reported monthly as expenses are charged to respective funding sources.			
16.	Organization has established a system for separation of duties, ensuring that no one individual controls all aspects of a financial transaction (e.g., receiving cash, depositing cash, recording cash, and reconciling bank account).			
17.	Organization has a system to ensure that those who			

	authorize a purchase is not the same person who signs for the cash disbursement, or that a counter-signatures for this disbursements is required.			
18.	Organization has a written purchase order/check request system.			
19.	Organization has a closely controlled petty cash system.			
20.	There is a system for handling all contributions, grants, and earnings including a means of providing contributors with receipts and reports.			
21.	Is there currently a system to track funding match contributions, both in-kind and cash?			
22.	Does the matching system separate expenses by program?			
23.	Revenues and Expenses are differentiated in the Accounting system by respective programs (e.g., the Executive Director's time is recorded separately for monitoring different programs.)			
	Do you have an allocation plan to determine how much of his/her salary goes to each?			
24.	Is your payroll process supported with individual payroll activity reports that abide by 2 CFR 200 regulations?			
25.	Does your accounting system and chart of accounts allow assignment of jobs or classes or other similar coding to track expenses eligible for reimbursement by the AmeriCorps Grant or other Federal funding sub-granted from AARP Foundation Experience Corps National?			

If your audit were next month, would you have current:	**Yes**	**No**	**Comments**
• Bank statements and reconciliations			
• Contracts with Independent Contractors			
• Quarterly Payroll tax forms			
• Leases, loan agreements, insurance policies			
• Payroll activity reports for each paid employee			
• Personnel/Benefit policies			
• Depreciation Schedule			
• Signed timesheets to support payroll activity reports			
• Receipts and other supporting documents to support expenditures			

Acknowledgement – to be signed by two representatives of the Affiliate: one project staff representative and one organizational (host) financial representative.

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

For Project Affiliate (Project Director/Staff):

BY:________________________________

____
PRINT NAME

____
TITLE

____
ADDRESS

____
DATE

For Project Affiliate (Org Financial Officer/Mngr):

BY:________________________________

____
PRINT NAME

____
TITLE

____
ADDRESS

____
DATE

AARP Foundation
Experience Corps Background Check Policy

Individual background checks serve as an important part of the AARP Foundation Experience Corps on-boarding process of employees and volunteers working with vulnerable populations. Background information is reviewed as a means of promoting a safe environment for current and future students, volunteers, and employees. Conducting background checks also ensures that we are meeting the necessary requirements and guidelines to provide services to the students and children we serve, as well as the older adults we engage in our work.

Who must comply?

All organizations that implement an AARP Foundation Experience Corps ("Experience Corps") program must comply with this policy. Failure to comply may result in the immediate termination of participation in the Experience Corps program.

DEFINITIONS

CNCS National Service Criminal History Check (NSCHC): *the background checks and associated procedures are required by law for certain CNCS grantees. Grantees subject to the NSCHC include, but are not limited to organizations that receive AmeriCorps, Senior Demonstration Program, Social Innovation Fund and RSVP grant awards. Find out more here: http://www.nationalservice.gov/sites/default/files/resource/faqs.pdf*

Employee: *an individual employed by an Experience Corps branch or affiliate host organization that works on the Experience Corps program directly or indirectly.*

FBI Background Check*: a Federal background check run through the Federal Bureau of Investigation. This check requires individuals to be fingerprinted.*

National Sex Offender Public Website (NSOPW)*: a free, web-based sex offender registry, updated continually. http://www.nsopw.gov/. Also referred to as the NSOPR, or National Sex Offender Public Registry*

Program: *the Experience Corps program.*

State repository: *the official designated state repository for criminal history information. This may be a name or fingerprint based check depending on laws in each individual state.*

Volunteer: *any individual who volunteers their time with the Experience Corps program and has recurring access (more than once) to students. Volunteers may include, but are not limited to, tutors, team leaders, fellows, and interns.*

Vulnerable populations: *Students in Experience Corps sites.*

VOLUNTEERS

<u>Volunteers **NOT** subject to the CNCS NSCHC regulations</u>
If a branch or affiliate has volunteers that are not subject to the NSCHC, the following rules apply:

1. Every volunteer must have two reference checks completed. Reference checks only need to be completed once.
2. The NSOPW check must be run every year for every volunteer.
3. The Program must ensure that both the FBI and State repository check are run for each volunteer at least once every 4 years. This can be completed in the following two ways:
   a. The school district may run the checks for the Program.
   b. The Program may run the checks.
4. If the school district does not run either the FBI or State repository check OR if they do not run the check at least every 4 years, the Program must supplement the school district's checks to meet the requirements above.

<u>Volunteers Subject to the NSCHC</u>

1. Every volunteer must have two reference checks completed. Reference checks only need to be completed once.
2. The NSOPW check must be run every year for every volunteer.
3. The Program must follow the NSCHC rules.

EMPLOYEES

All employees working on the Experience Corps Program must undergo a background check. Employees may undergo background checks according to organization policy, however, where applicable, programs must follow the NSCHC rules.

PROCEDURES

If a Program is running background checks, the Program shall use its organization's policies to vet both employees and volunteers. Additional requirements include:

1. Failure to clear the National Sex Offender Registry will disallow participation in or will result in automatic dismissal from the Program.
2. Convictions of murder, assault/battery, child abuse, and sexual assault will also preclude or result in separation from the Program.

Failure to clear other background checks may not automatically result in immediate dismissal from the Program. Instead, the following factors may be taken into consideration before making a final determination regarding fitness for participation in the Program:

- The significance of risk reported in a personal or professional reference
- The status of a criminal or civil charge (pending or convicted)
- The length of time since a criminal or civil conviction
- The nature of the crime
- The relationship between the job to be performed and the crime committed

- The number of convictions
- Rehabilitation efforts and recommendations
- Subsequent employment history

APPROVAL
Submit Background check “plan” to Field Service point of contact for review and approval annually. The plan must include:

a. How many of your volunteers and employees are subject to the NSCHC and how many are not?
b. The entity that will be running the background checks.
c. The frequency of the check.
d. The names of the vendors and/or repositories that will be searched.
e. Any alternate search protocol you may have received from CNCS, if applicable.
f. If a school district is being used to meet requirements (for those not subject to NSCHC) provide any underlying policy or law that dictates, (a) which repositories are used, (b) how frequently a school district runs checks, (c) criteria school district uses to screen volunteers.
g. Who is responsible for making the final decision when a rap sheet produces convictions?
h. How will you record and track whether or not individuals have been cleared for service.

The attached template should be completed and returned within 30 days.

Experience Corps Background Check Policy Compliance Evidence

Site Name: Click here to enter text.

Person Completing Form: Click here to enter text.

This form must be completed and submitted to your Field Services Point of Contact no later than Click here to enter a date.

1. The NSCHC applies to my site.
   - ☐No
   - ☐Yes

   If yes, I understand the National Service Criminal History Check rules and regulations including all annual updates as they apply to my site, and agree to comply with said regulations. ☐

2. Please detail your plan for complying with the EC Background Check policy for volunteers and staff not subject to the NSCHC. If a school district is being used to meet requirements (for those not subject to NSCHC) provide any underlying policy or law that dictates, (a) which repositories are used , (b) how frequently a school district runs checks, (c) criteria school district uses to screen volunteers.

Volunteers:

NSOPR: Click here to enter text.

Source/Vendor: Click here to enter text.

Staff Responsible: Click here to enter text.

FBI CHECK:

Source/Vendor: Click here to enter text.

Staff Responsible: Click here to enter text.

STATE REPOSITORY CHECK

Source/Vendor: Click here to enter text.

Staff Responsible: Click here to enter text.

REFERENCE CHECK

Source/Vendor: Click here to enter text.

Staff Responsible: Click here to enter text.

OTHER

Source/Vendor: Click here to enter text.

Staff Responsible: Click here to enter text.

Who is responsible for making the final decision when a criminal record produces convictions?

Click here to enter text.

How will you record and track whether or not individuals have been cleared for service.

Click here to enter text.

Staff:

Please attach organizational policy.

Experience Corps Annual Data Collection/ Performance Monitoring: Salesforce and Surveys

Frequently Asked Questions

Contents

1. How do Experience Corps local programs collect data each year?

Experience Corps local programs collect data each year through two main means/vehicles:

- Salesforce database
- Annual surveys

2. What data are collected through Salesforce and what data are collected through the annual surveys?

Salesforce captures descriptive data about the local EC program and its staff, schools the EC program operates in, the volunteer tutors, teachers and classrooms participating, tutoring sessions, and the students in EC. Data is entered into Salesforce in an **ongoing fashion throughout** the course of the school year.

The annual surveys capture program outcome and satisfaction information reported by teachers and volunteers. Surveys are filled out electronically at the end of the school year.

3. How and when do local programs enter data into Salesforce?

Each program site must have a data/ evaluation lead. A core function of this person's job is data management and evaluation. It is that person's responsibility (with ultimate accountability to the Project Director) to ensure that data is input into Salesforce throughout the year—starting at the beginning of the school year.

4. **How and when are surveys completed?**

Unlike Salesforce, surveys are filled out at the end of the school year by teachers and volunteers. They are filled out through the electronic survey system. It is the data/evaluation lead's responsibility (along with the Project Director) to make sure that the teachers and volunteers have the information and assistance they need to ensure these surveys are filled out.

5. What surveys must each local program make sure are completed each year?

In the 2016-17 school year, every program site is required to field the following Experience Corps surveys:

- Post-Tutoring Survey
- Teacher Program Evaluation
- Tutor Survey
- Tutor Progress Review*

Post-surveys should be completed either at the end of the program year or when a tutoring match has ended. Teacher program evaluations and tutor surveys are to be competed electronically at the end of the program year along with post-surveys. Tutor Progress reviews are required to be done per our program standards, and kept in each volunteer's folder but can be created by the local site based on local needs two times per year. The national office does not require a certain content of this survey. An example resides in the EC-E-Kit. Please refer to the document entitled "EC Surveys At-A-Glance" for additional details.

The national office will provide reporting forms and progress reports to sites receiving federal pass-through funding (e.g. SIF DOJ/OJJDP, AmeriCorps, and SIF etc.). These forms and reports must also be completed and submitted by the deadline established by the national office.

6. Can I modify the surveys for my program site?

To maintain consistency across the EC network, it is important that all surveys follow the same sequence and format. However, Experience Corps recognizes that local programs may need the addition of one or more questions. This will be considered on a case by case basis as long as additional questions are added to the end of the survey and are not embedded in a way that disrupts the sequence or content of the existing survey questions. Any such changes must be reviewed and approved by the national office. Please send your requests to ssiegel@aarp.org and rcannnon@aarp.org.

7. What method do we use to distribute and collect surveys?

SIF sites are required to use electronic surveys using software and training provided by the national office. Teachers and tutors use a computer or other electronic device to access the web-based surveys. Once completed, the information automatically populates the EC Salesforce database.

8. When are surveys due each year?

End of year surveys (post-surveys, teacher program evaluations, volunteer tutor surveys) are due in May or the beginning of June depending on the end of the school year. The national EC office will send out an email in March outlining specific due dates by site. Sites who receive federal pass-through funding must also adhere to reporting deadlines provided by the national office.

9. How are the data used?

The data collected in Salesforce can be analyzed by the local site whenever needed by generating reports in the Salesforce system. Additionally key Salesforce data and annual survey data are analyzed by EC National and reported back to each local program site in September. These local program site reports can be used for program monitoring and improvement, longitudinal tracking, and marketing/reporting. Additionally, the data are aggregated annually across all EC sites to give a picture of the program as a whole. Finally, disaggregated cleansed survey data are given back to sites in an excel file so they can do additional analysis if they choose.

10. How does annual data collection/performance monitoring differ from the SIF implementation evaluation and impact evaluation?

In addition to annual data collection and monitoring EC is required to conduct an implementation and impact evaluation as part of the SIF grant. The goal of this work is to 1) Ensure fidelity to the EC program model 2) prove that small group sustained tutoring is an evidenced based option. Therefore in addition to the regular annual data collection Abt associates will be conducting an implementation and impact evaluation as part of this grant. The data collected through annual performance monitoring will be utilized as part of the evaluation. The evaluation will dig deeper into how each site is implementing the program model and what is working well and should be shared and what can be improved. The impact evaluation will use a comparison group design to prove the effectiveness of small group sustained tutoring and small group sustained plus literacy assistance. While annual data collection and performance monitoring happen each year, the implementation and impact evaluation are finite and will happen between 2017-2020.

AARP Foundation®

Brand Identity and Style Guide

July 2016

Introduction

Consistency is key to any strong brand. In order to strengthen and align the AARP Foundation brand, we have created these simplified and streamlined guidelines to help stakeholders.

A unified approach to the application of the AARP Foundation brand will help build our reputation and relevance and ensure differentiation. It will also help complement the AARP brand. These visual guidelines are provided to help strengthen what AARP Foundation stands for, and to clarify an improved alignment across all of our programs and initiatives.

If you have any questions concerning these guidelines, please contact AARP Foundation's Strategic Communications team.

AARP Foundation Logo

The new logo is a key part of our updated look and feel, driving consistency and focus. It also helps to identify the Foundation within the AARP family and improve the balance between "AARP" and "AARP Foundation" to create a more clearly identifiable and confident logo.

The AARP Foundation logo should be used on all communications – print and digital. This helps build our brand and ensures our audiences see our "signature" on all the important work we do.

Our logo may only be reproduced from master original artwork files and must not be drawn, retyped or altered in any way.

For creative developed by AARP or AARP Foundation, the AARP Foundation logo should be placed to the left.

Logo files can be found on Sharenet.

1

Logo Versions
To allow for flexibility across our communication channels, alternative color versions of the Foundation logo are available.

Recommended Use: Our recommended logo is the two-color version (figure 1). This should always be your first choice.

An alternative choice has been created for use on imagery or backgrounds featuring a dark color (figure 2).

All logo files can be found on Sharenet. Please only use original artwork for all versions of the AARP Foundation logo. Please do not download from the internet.

The logo cannot be stacked.

2

Clear Space

It is important that there is clear space around the AARP Foundation logo. This will give it prominence and allow it to stand out.

Keep the AARP Foundation logo clear of competing text, images and graphics. Surround it on all sides with clear space – a minimum of half the height of the logo – as shown in figure 3.

3

Minimum Size

The logo's minimum acceptable size is a 0.2" cap height, as shown in figure 4. Scale the logo proportionally, without distortion.

4

Our Decision Tree

Consistent application of the AARP Foundation identity is important. The decision tree below is used to determine the appropriate logo or treatment. A member of the Strategic Communications team will determine the best treatment for your project.

Q: Is it one of AARP Foundation's core business categories, initiatives or programs

—YES→

The Foundation logo is used; this is our default mark.

Note: A URL may be created for the specific program.

—YES→ AARP Foundation

Q: Is it a sponsorship, partnership, grant or underwritten program?

—YES→

Co–brand:
Descriptive copy is used to define the partnership. AARP Foundation's logo will then follow our guidelines to ensure a consistent 50/50 relationship between the Foundation and its partner(s).

—YES→ Presented by AARP Foundation | THE HARTFORD

Sponsorship/Grant:
Descriptive language is used to recognize the support of the organizations.

—YES→ Made possible from THE HARTFORD

Q: Is it a pilot program or initiative via the innovation pipeline?

—YES→

A treatment approach as outlined in the guidelines will be used.

—YES→ See Section 2.2

Q: Is it a Foundation or specialty business, or service that needs to retain a degree of independence for success?

—YES→

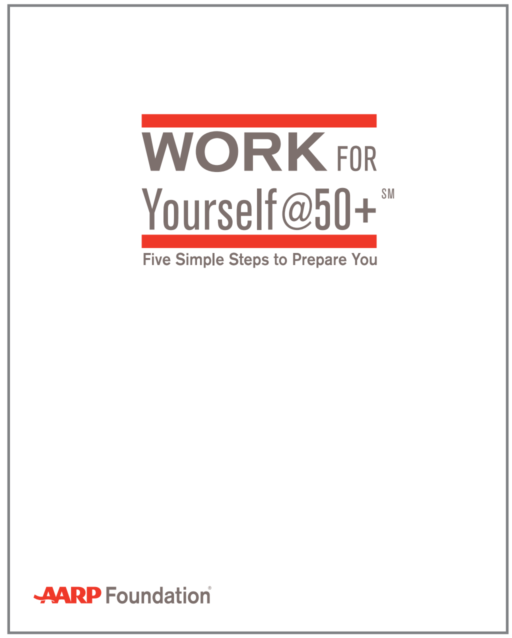
Has a leadership-level decision been made that a degree of independence should be permanent?

—YES→

The Foundation Communications team will establish a suitable treatment.

Text Treatment (preferred)

This is the preferred approach for initial programs/pilots that are part of the innovation pipeline. For covers, reports and training manuals, the pilot program name may be put into a stylized treatment for these specific uses, without the creation of a new mark (see figure 5). In text references the program name will appear in bold or italics (see figure 6).



5

Front Cover Example

If you're considering self-employment, you may not know where to start. **Work for Yourself @50+** will help you decide whether being self-employed is right for you. For example, what are the pros and cons of being your own boss? What resources do you need to be self-employed? How will self-employment affect your current lifestyle?

6

Example of program in copy

Established Programs and Flagship Services

For our established programs or flagship programs with a proven track record of success, a standardized treatment has been created for special, exceptional uses (such as a logo on a backpack). In all instances, the AARP Foundation logo sits on top as a trusted mark, followed by stylized color text treatment. Approved descriptor language can also be provided below to help further define the program/service or acronym.

This treatment is applicable for use on premiums, signage, shirts and giveaway items. Informational materials (brochures, toolkits, etc.) will use the main AARP Foundation logo.

Rule of thumb: In materials where the program name is used in copy or explanatory text, the main AARP Foundation logo should be used where a logo is called for.

Clear Space

It is important that there is clear space around the treatment. This will give it prominence and allow it to stand out.

Keep the treatment clear of competing text, images and graphics. Surround it on all sides with clear space – a minimum of a quarter the height of the treatment – as shown in figure 7.

7

Minimum Size

The treatment's minimum acceptable size is a 0.5" cap height, as shown in figure 8. Scale the treatment proportionally, without distortion.

8

NOTE: The creation of a sub-brand is a leadership decision.
Consult the Communications team if you have a special need.

Affiliated Initiatives

Initiatives with affiliation are typically a distinct partnership (e.g., sports and investment partnerships), or programs developed for a very distinct audience (e.g., donor appreciation, intergenerational engagement).

Ultimately, Foundation leadership will make the final decision on whether or not a unique identity for an initiative is required.

Example of a Unique Identity

NOTE: Please contact the AARP Foundation Strategic Communications team to help determine the appropriate treatment.

Sponsorships

AARP Foundation is working to partner with more and more foundations, corporations and community organizations to accomplish our mission. To accomplish our goal, it is important to ensure that each partnership is expressed in a consistent and appropriately represented manner.

Any co-brand lock-up or sponsorship language should be discussed with AARP Foundation Strategic Communications in advance of any agreements or usage.

Sponsorships and Grant Recognition
As a charitable organization, donors and grants are the lifeline of our organization. This support allows AARP Foundation to continue to help transform the lives of older low-income adults. Given this, appropriate recognition is essential. (figure 9)

To recognize the sponsorship or grantee relationship, the following language can be used:

"Made possible in part through a grant from"
"With the generous support of"
"An investment from"
"Supported by"
"Presented by"

9

Front Cover

Boiler Plate


ABOUT AARP FOUNDATION

AARP Foundation works to ensure that low-income, vulnerable older adults have nutritious food, affordable housing, a steady income, and strong and sustaining social bonds. We collaborate with individuals and organizations who share our commitment to innovation and our passion for problemsolving. Supported by vigorous legal advocacy, we create and advance effective solutions that help struggling older adults transform their lives. AARP Foundation is a 501(c)(3) charitable affiliate of AARP.

in collaboration with

charles SCHWAB FOUNDATION

Back Cover

Co-Branding

Co-Branding
Co-branding allows our services and programs to move beyond their traditional customer base and to gain attention from new audiences. It is an agreement between two different brands to jointly promote a product or service. The goal is to combine the strength of two brands in order to increase consumer awareness and usage. (figure 10)

To clearly express the relationship, a simple key line is placed between the two logos. The key line is the same height as the logos and the weight should be proportional with the lock-up. The key line should be in warm gray.

The relationship can be defined in the following manner.

"Brought to you by"
"Presented by"
"A partnership between"
"A collaboration between"

10 Brought to you by
AARP Foundation | THE HARTFORD

Back Cover

NOTE: Any co-branded lock-up must be created with the involvement of the Strategic Communications team and requires approval before usage.

Desktop typefaces and Email Signature 3

Desktop Font

Arial and Calibri are our primary typefaces for AARP Foundation internal desktop communications and products like Word and PowerPoint. The typefaces can be used for reports, presentations, emails and other tasks.

Use Arial or Calibri at all times as our desktop font so that all documents retain a consistent appearance.

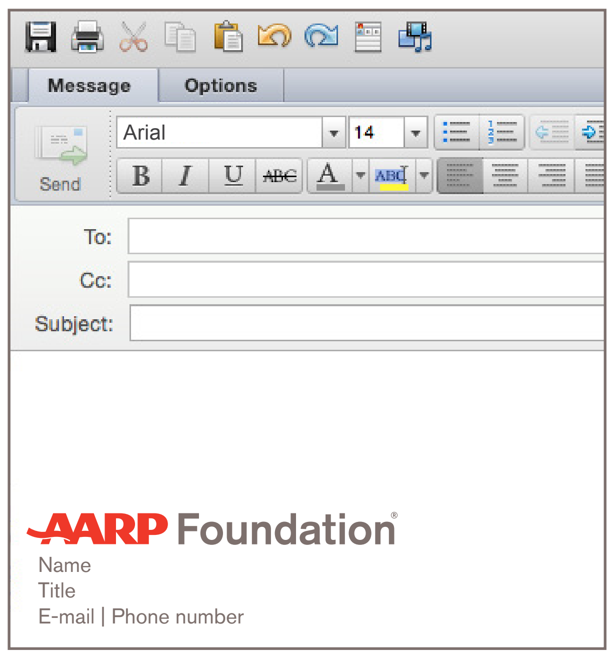
Arial Regular
Arial Italics
Arial Bold

Calibri Regular
Calibri Italics
Calibri Bold

Email Signature

The email signature template is fully editable to accommodate individual requirements.

All text is set in Arial or Calibri.
An email-friendly logo can be found on Sharenet.



Fonts

Our identity system offers two main typefaces that illustrate the courage (Corporate S) and the caring (Akzidenz-Grotesk) of our brand personality. Both fonts have a modernity that combines with our other graphic elements to create a fresh and energetic feeling.

For all publications and collateral materials generated by AARP Foundation, please use these fonts at a minimum font size of 11 pt to ensure legibility.

Corporate S Regular
Corporate S Bold
Corporate S Extrabold

Akzidenz-Grotesk Regular
Akzidenz-Grotesk Medium
Akzidenz-Grotesk Bold

Akzidenz-Grotesk Condensed Light
Akzidenz-Grotesk Condensed Regular
Akzidenz-Grotesk Condensed Medium
Akzidenz-Grotesk Condensed Bold

Colors

AARP Foundation uses three primary colors plus white: Red (PMS 485), Warm Gray 9, Warm Gray 11 and Burgundy (PMS 195).

MAIN

PMS 485

PMS Warm Gray 11

PMS Warm Gray 9

PMS 195

Secondary Colors

We use our accent colors to complement the primary palette and to differentiate our approved flagship treatments.

The secondary color palette consists of Pantone colors. The secondary palette adds flexibility for charts, graphs and infographics to help emphasize type and general information.

SECONDARY

Pantone 273 C

Pantone 7473 C

Pantone 575 C

Pantone 7746 C

Pantone 7563 C

Pantone 7622 C

The people we serve through our work are struggling, but they are not defeated. We should portray them as resilient, determined and hopeful in order to emphasize the strength of character, personality and individuality.

Our photography is authentic, emotive, aware, vibrant and engaging. It is the best way to communicate our work. Subjects may look directly into the camera, but their gaze should be steady rather than pleading or resigned. We show older adults across the age spectrum, reflecting the diversity of the community and the realities of how people age.

Our photography needs to be believable to create an emotional connection with our potential clients or donors. Photographs should focus on the person, and the environment can help to shape context for their lives.

To capture the spirit and pride of the volunteers who help drive our mission in communities across the nation, we utilize images that show the pride in the work they do.

Application of Approved Wordmark/Treatment

The visuals presented on this page are provided to help inform how text treatment or flagship programs should be incorporated into a layout or applied to an item (e.g., giveaways).

To help strengthen our brand, the preference is to use the Foundation logo as the default mark on most creative assets. (figure C)

Flagship or established program marks will be used on localized program collateral and giveaway items. (figure A, B, D)

For questions regarding treatment application, please work with the Foundation Strategic Communications team to help make the appropriate decision.

Figure A

Figure B

Figure C

Figure D

Copyright and trademarks
Use the proper trademarks and copyright attribution in company documents. Our trademarks on advertising materials must be accompanied by either the ® or ™ symbol following every usage of the mark. In text usage the symbol only has to be used the first time.

Program Name Check/Creation
Name creation and legal clearance for name and url are the responsibility of the Strategic Communications team. If you are considering a new name or need to confirm usage, please contact a member of the Strategic Communications team to help you navigate this process.

AARP FOUNDATION

AARP Foundation Impact System (FIS) User Agreement Exhibit H-1

AARP Foundation, a non-profit 501(c)(3) charitable affiliate of AARP, works with local groups, government and national organizations, and corporations, to create and support solutions that help older people meet life's essentials: food, housing, income and personal connection. AARP Foundation uses the Foundation Impact System (FIS), a customized version of Salesforce.com, to serve struggling Americans 50+ and to track program activities. Data collected in the FIS may include personally identifiable information about program participants.

AARP Foundation initiatives use the FIS to track program activities to measure impact. AARP Foundation establishes formal relationships with community partner organizations who carry out program activities and who use the system to track results. Staff and volunteers from community partner organizations and AARP Foundation access the FIS through individual licenses which are provided by AARP Foundation.

This agreement outlines the policies and procedures that FIS Users must abide by in order to keep secure personally identifiable information in the system, to obey applicable Federal laws and policies related to data privacy, security and protecting personally identifiable and sensitive information, and to maintain the trustworthy reputations of AARP, AARP Foundation and our partner organizations.

As an AARP Foundation FIS user, I understand that I have personal responsibility to:

- Maintain the confidentiality of personally identifiable information located in the FIS.
- Comply with all applicable AARP Foundation policies, procedures and guidelines, as well as applicable Federal laws and policies related to data privacy, security and protecting personally identifiable and sensitive information.
- Notify my manager and/or AARP Foundation if I observe any violations of the terms of this agreement and/or FIS policies.

I will not:

- Tamper with, change, delete, copy, transmit or alter data unless authorized to do so.
- Disclose personal information about individuals in the FIS without proper authorization from the management of the AARP Foundation.
- Use FIS for any purpose other than AARP Foundation -related activities. I understand that doing so may lead to the disclosure of personally identifiable information, and appropriate remedies may include civil liability as well as separation from the community partner site as appropriate.

I understand that:

- Sharing my user login information – i.e. username and password – is strictly prohibited.
- My use of the AARP Foundation Impact System will be monitored by the AARP Foundation.

- Files outside the FIS that contain personally identifiable information must be securely stored in locked file cabinets.

- Personal information housed in the FIS may only be shared with the staff of the AARP Foundation program at the community partner organization to conduct approved program activities. It may not be shared with other internal or external organizations, including AARP, or be used to conduct personal business.

- Reports containing personal information generated in the FIS may not be stored on personal computers.

- Appropriate methods must be used when destroying reports containing personal information, including using a cross-cut shredder to destroy paper records.

- Any fraudulent activities are prohibited.

- Any unauthorized release of data can harm program participants, my organization, and AARP Foundation.

- The sale of any data or information about AARP Foundation program participants is strictly prohibited.

- It is my responsibility to seek clarification on these policies by contacting my manager or Joe Begg (jbegg@aarp.org).

I will immediately notify my program manager and/ or AARP Foundation of any unauthorized use of my account or any other breach of security.

AARP Foundation will investigate any and all suspected violations of these policies and reserves the right to take corrective or legal action against the violator. If an investigation is warranted, a user's account access may be disabled. This policy may be updated periodically and updates shall be effective when posted in the AARP Foundation Impact System library.

<u>Certification by User:</u>

I hereby certify that I have received a copy of the AARP Foundation Impact System User Agreement and understand that my access to this system is conditional upon my compliance with these rules. I agree to abide by the terms of the FIS User Agreement.

AARP Foundation Program or Partner Organization	
Name of FIS User	
Signature	
Date	

AARP Volunteer Portal (AVP) User Agreement Exhibit H-2

AARP Foundation, a non-profit 501(c)(3) charitable affiliate of AARP, works with local groups, government and national organizations, and corporations, to create and support solutions that help older people meet life's essentials: food, housing, income and personal connection. AARP Foundation uses the AARP Volunteer Portal, a customized version of Salesforce.com, to help volunteers serve struggling Americans 50+. Data collected in the AVP may include personally identifiable information about program participants.

AARP Foundation initiatives use the AVP to communicate information about Experience Corps volunteer assignments as well as to provide and receive content from Experience Corps volunteers. AVP also provides a way for Experience Corps volunteers to communicate with one another. Staff and volunteers from community partner organizations and AARP Foundation access the AVP through individual licenses which are provided to AARP Foundation by AARP.

This agreement outlines the policies and procedures that AVP Users must abide by in order to keep secure personally identifiable information in the system, to obey applicable Federal laws and policies related to data privacy, security and protecting personally identifiable and sensitive information, and to maintain the trustworthy reputations of AARP, AARP Foundation and our partner organizations.

As an AARP AVP user, I understand that I have personal responsibility to:

- Maintain the confidentiality of personally identifiable information located in the AVP.
- Comply with all applicable AARP Foundation policies, procedures and guidelines, as well as applicable Federal laws and policies related to data privacy, security and protecting personally identifiable and sensitive information.
- Notify my manager and/or AARP Foundation if I observe any violations of the terms of this agreement and/or AVP policies.

I will not:

- Tamper with, change, delete, copy, transmit or alter data unless authorized to do so.
- Disclose personal information about individuals in the AVP without proper authorization from the management of the AARP Foundation.
- Use AVP for any purpose other than AARP Foundation -related activities. I understand that doing so may lead to the disclosure of personally identifiable information, and appropriate remedies may include civil liability as well as separation from the community partner site as appropriate.

I understand that:

- Sharing my user login information – i.e. username and password – is strictly prohibited.
- My use of the AVP will be monitored by the AARP Foundation.

- Files outside the AVP that contain personally identifiable information must be securely stored in locked file cabinets.

- Personal information housed in the AVP may only be shared with the staff of the AARP Foundation program at the community partner organization to conduct approved program activities. It may not be shared with other internal or external organizations, including AARP, or be used to conduct personal business.

- Reports containing personal information generated in the AVP may not be stored on personal computers.

- Appropriate methods must be used when destroying reports containing personal information, including using a cross-cut shredder to destroy paper records.

- Any fraudulent activities are prohibited.

- Any unauthorized release of data can harm program participants, my organization, and AARP Foundation.

- The sale of any data or information about AARP Foundation program participants is strictly prohibited.

- It is my responsibility to seek clarification on these policies by contacting my manager or _________.

I will immediately notify my program manager and/ or AARP Foundation of any unauthorized use of my account or any other breach of security.

AARP Foundation will investigate any and all suspected violations of these policies and reserves the right to take corrective or legal action against the violator. If an investigation is warranted, a user's account access may be disabled. This policy may be updated periodically and updates shall be effective when posted in the AVP library.

<u>Certification by User:</u>

I hereby certify that I have received a copy of the AVP User Agreement and understand that my access to this system is conditional upon my compliance with these rules. I agree to abide by the terms of the FIS User Agreement.

AARP Foundation Program or Partner Organization	
Name of FIS User	
Signature	
Date	