Growing Bigger Better

LESSONS FROM EXPERIENCE CORPS' EXPANSION IN FIVE CITIES

Lauren J. Kotloff
with Linda Jucovy

P/PV A Publication of Public/Private Ventures

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Public/Private Ventures is a national nonprofit organization that seeks to improve the effectiveness of social policies and programs. P/PV designs, tests and studies initiatives that increase supports, skills and opportunities of residents of low-income communities; works with policymakers to see that the lessons and evidence produced are reflected in policy; and provides training, technical assistance and learning opportunities to practitioners based on documented effective practices.

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Foreword

by Laura C. Leviton, Ph.D.
The Robert Wood Johnson Foundation

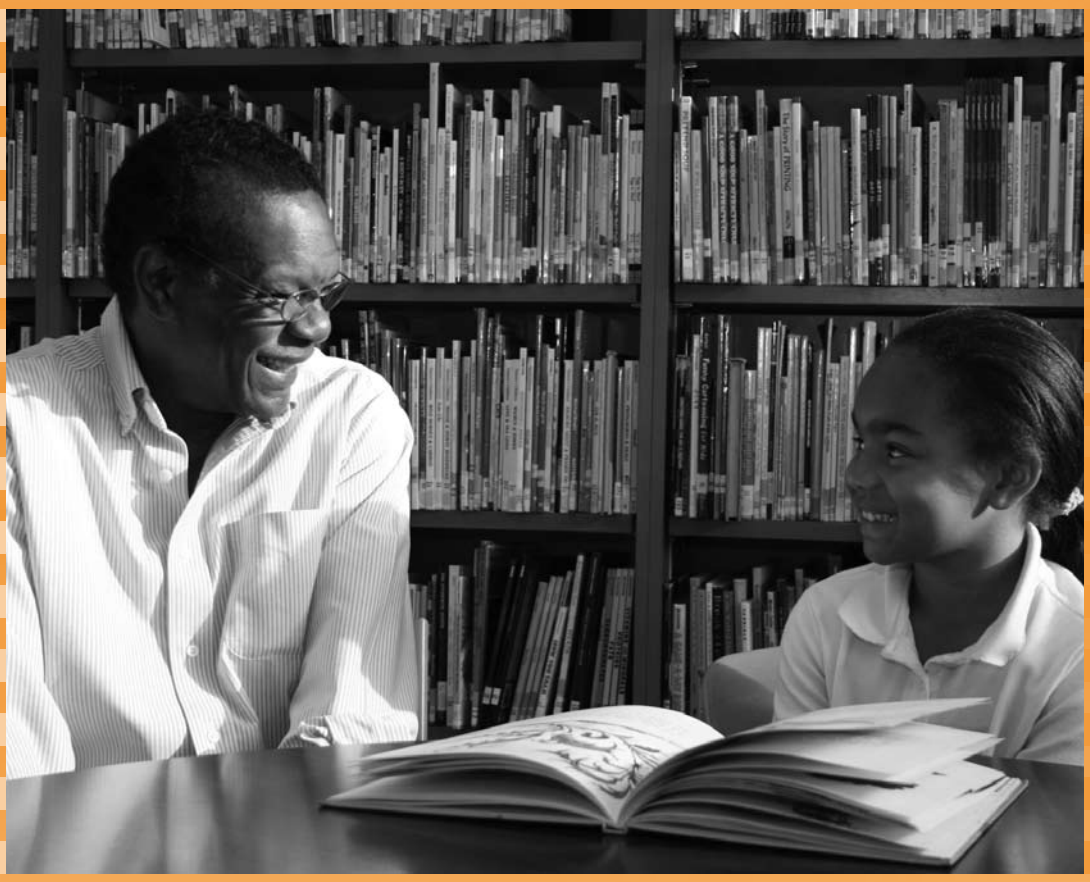
With the retirement of 78 million baby boomers over the next few decades, growing numbers of healthy, active older Americans will be looking to engage in socially and personally meaningful activities. This is potentially a boon for programs around the country that benefit from the service of retired volunteers.

The Experience Corps program is a leading example of what can be accomplished. Designed to mobilize the time and talents of older Americans, Experience Corps recruits adults age 55 and older as volunteers to help strengthen the academic skills of children in urban elementary schools. Inspired and intrigued by the potential of the Experience Corps model, the Robert Wood Johnson Foundation (RWJF) provided Experience Corps with funds to expand in 5 of its 14 cities, beginning in 2002. The goal was to bring each small to midsize program closer to scale by the end of the four-year initiative. Understanding the complexity of the undertaking, we asked Public/Private Ventures (P/PV) to evaluate the expansion effort and to document the strategies sites used to tackle challenges they encountered along the way.

As this report shows, the program largely succeeded in overcoming these challenges and ended the initiative "bigger and better." Highly committed to benefiting both the older adult volunteers and the students they served, Experience Corps grew without sacrificing the core principles of the program.

Experience Corps should be commended for its willingness to participate in a rigorous evaluation of its expansion effort. The results have provided valuable insights for other programs considering such growth, including the conditions that help assure success as well as the difficulties programs are likely to face. One of the most notable of these difficulties revolves around the elusiveness of sustainable funding. As we strive to create lasting change in the lives of vulnerable people, policymakers and foundations should look for ways to support effective, well-tested programs with the potential to grow.

Executive Summary



Innovative social programs with a track record of success often strive to find the means to expand, or "scale up," to increase the numbers of people they serve. Scaling up frequently entails replicating the program in new locations, but it can also involve efforts to expand the program's reach in existing locations so it can have a more lasting and significant impact on the communities currently being served.

Expansion poses many challenges for programs and organizations. In its report on the growth of nonprofit youth-serving organizations, The Bridgespan Group notes that expansion brings organizational, programmatic and financial changes to programs regardless of their initial size.[1] In the midst of these changes, maintaining a program's quality, consistency and integrity to its core principles can be difficult. Under pressure to meet goals for growth and wisely allocate limited resources, programs often struggle to put sufficient structures and practices in place that will enable them to continue to deliver high-quality services and be sustained over time.[2]

For expansion to succeed, a program must be internally ready to address these challenges. According to one review of the elements that contribute to successful expansion, being ready means the organization operating the program must possess, or be able to quickly develop, the key skills and capacities, quality control systems and administrative infrastructure needed to achieve desired growth and to manage a larger program. It must also have a plan for attaining the financial and material resources it will need to grow and sustain that growth. Externally, there should be a demand for the program's services so that the population or institutions it wishes to serve will be receptive to the program. Finally, there should be identifiable benefits for a program that is undergoing expansion, such as brand recognition, organizational learning or economies of scale.[3]

Experience Corps

The following pages summarize a report by Public/Private Ventures (P/PV) that documents and draws lessons from an ambitious expansion initiative involving Experience Corps—a program that enlists older adults to help strengthen the literacy and other academic and social skills of elementary school students. Experience Corps is a signature program of Civic Ventures, a nonprofit organization whose mission is to "lead the call to engage millions of baby boomers as a vital workforce for social change." Begun in 1995 as a pilot project at 12 schools in five cities, Experience Corps recruits and places teams of between 5 and 15 volunteers—called Experience Corps members—in elementary schools in low-income neighborhoods. The members work with children, typically in grades K–3, who are having difficulty learning to read and could benefit from additional support from a caring adult. They provide one-to-one literacy tutoring outside of the classroom or in-class support to individuals and small groups of students in literacy and other academic areas under a teacher's direction.

Each of the Experience Corps programs is housed within a "host agency," a nonprofit organization (or, in one case, an organization that is part of a public university) that has chosen to run the program, according to the nationally guided model, as part of its agency's work. Experience Corps was designed to provide a range of benefits to the children, the schools they attend and the volunteers themselves. To achieve these goals, the Experience Corps program model was built around a set of basic principles and essential components. At the time the expansion initiative began, they included the following:

- Volunteers are asked to make a substantial commitment to the program by serving each week throughout the school year, committing about 5 hours a week as "part-time" members or 15 hours a week as "full-time" members (full-time members receive a small monthly stipend; part-time members do not).
- Prior to being placed in a school, and throughout the school year in some sites, volunteers receive training from Experience Corps staff or outside experts in literacy, behavior management, child development and working in schools.
- Having a team of volunteers in each school allows the older adults to develop strong and

supportive networks of colleagues. Each team can also foster a large enough presence to have an impact on the climate of the entire school.

- The program provides opportunities for leadership, with volunteers engaging in the life of the school, changing perceptions about aging and contributing to the program's direction.

Together, these principles and practices are aimed at achieving significant, measurable gains in both student achievement and member well-being.[4]

The Expansion Initiative

In 2001, the Robert Wood Johnson Foundation (RWJF) and The Atlantic Philanthropies (AP) provided Experience Corps with funds for a four-year initiative to expand its reach in five of its cities. The expansion initiative began in September 2002 and concluded in June 2006.

Civic Ventures selected the sites to participate in the initiative and set goals for each site depending on its capacity to expand. Philadelphia, the largest Experience Corps program, was chosen as the *lead site*, which meant that it was expected to add 800 new volunteers over the four years of expansion, operate at 40 schools[5] and serve at least 5,000 low-income children. After reviewing proposals from seven other Experience Corps sites, Civic Ventures selected New York and Boston as *scale* sites; each would each add 400 new volunteers, operate at 20 schools and serve at least 2,500 children. Cleveland and Washington, DC, became the *growth* sites; each agreed to add 200 new volunteers, operate at 16 schools and serve at least 1,250 children. At each site, half of the new volunteers were expected to be full-timers (serving 15 hours a week) and half were expected to be part-timers.

The grants also provided funds for Civic Ventures to establish an Experience Corps national office in Washington, DC, to guide the expansion initiative and serve as a resource and support for the entire Experience Corps network. Its larger mission was to help Experience Corps evolve from a collection of small programs into a large-scale, nationwide program with an identifiable set of core features.

Focusing on key elements of the expansion, P/PV's study examined the sites' efforts to increase the size of their volunteer pool and expand to additional schools, manage their larger and more complex programs, and raise sufficient funds to meet annual goals and sustain growth. In addressing each issue, the full report considers how the sites' initial readiness to expand, the organizational resources they were able to bring to the expansion effort, and the receptivity of the external environment (i.e., the local school districts) in which expansion took place shaped the sites' progress. This summary draws together key findings from that report, reflecting on whether and how the local sites, and the program as a whole, benefited from the expansion effort. It also describes lessons learned from the sites' expansion efforts that are relevant to other programs considering a formal expansion initiative.

Summary of Findings

The study found that, to a large extent, the sites successfully adapted to the many challenges brought by expansion. Further, the four-year initiative gave Experience Corps an opportunity to extend its reach within each of the five participating cities. It also enabled Experience Corps to gain recognition as a nationwide network whose local sites had a shared identity and operated under a common logo.

During the four years of the initiative, the expansion sites faced a number of major challenges. Foremost among these were changes in the external environment that could potentially have made it more difficult to expand to additional schools. More specifically, the five cities in which the sites were located all experienced some combination of school district reorganization and changes in leadership, cutbacks in the budgets of school districts and individual schools, and scheduling and curricular reforms that made it more difficult to remove students from their classrooms for one-to-one tutoring.

The sites similarly faced several challenges in reaching their volunteer recruitment goals. None of them had ever attempted such a large and rapid increase in size, and thus they were unsure about the recruitment strategies that would be most effective at this scale and the staffing levels and administrative systems that they would need in order to recruit, process and keep track of increasingly large

Research Methods

P/PV carried out data collection for this study between February 2003 and June 2006. The research methods we selected enabled us to document the structure and operations of the sites just prior to expansion, follow their efforts at semiannual intervals and record their progress toward reaching their expansion goals. We oriented our data analysis toward identifying the challenges, strategies and successes that were common across the five sites as well as those that resulted from local conditions. We also worked to ensure that perspectives of all key participant groups were included. Primary sources of data include:

- ***Interviews*** carried out during annual visits to the expansion sites and semiannual phone conversations with Experience Corps program directors and staff from the national office. During the site visits, interviews were conducted with Experience Corps and host agency staff, teachers and principals from Experience Corps schools, and small groups of Experience Corps volunteers.
- ***A volunteer intake survey*** administered annually to all volunteers enrolled in the program from September 2003 to January 2006 to gather information on their demographics (e.g., race, gender, age, education level), how they heard about Experience Corps, their reasons for joining and their previous volunteer and professional experience.
- ***Semiannual reports and other written materials*** submitted to the national office by the expansion sites, documenting their progress toward annual expansion benchmarks.

numbers of volunteers. In addition, although the expansion grants were substantial, the sites still had to raise a significant portion of their budgets; as they grew, the amount of funds they had to raise would increase to well beyond what they had needed to generate in previous years. To meet their immediate funding needs and position themselves for future growth and stability, the sites would have to expand and diversify their funding base.

Overall, the five Experience Corps sites showed great flexibility and creativity in adapting to the challenges brought by expansion. Their most significant achievements include the following:

The sites met, or nearly met, their goals for school expansion.

Despite major school reform efforts, budget cuts and leadership changes in local school districts that could have impeded their growth, the sites went from operating Experience Corps programs in 4 to 12 schools (depending on the site) at the start of expansion to having programs in 9 to 43 schools by the end. The sites' good relationships with the schools and their flexibility in adapting to changes in school schedules, personnel and priorities helped them meet this challenge. Executive Summary Table 1 describes the growth of each site.

By Year Four, most of the sites had many times more volunteers serving in the program than they had at baseline.

Volunteer enrollment ranged from roughly 40 to a little over 100 right before expansion; at the end of the expansion initiative, these numbers had grown to between 160 and almost 550. Moreover, the sites succeeded in attracting many individuals who had not been involved in sustained volunteer activity in the past. The effort required that sites move from seasonal recruitment to more intensive and sustained year-round recruitment. Support from a well-connected host agency was also extremely helpful to sites' recruitment efforts.

Stipends were an important incentive for attracting individuals willing to serve 15 hours a week. One site experimented with offering reduced stipends to individuals who wanted to serve fewer hours, a strategy that appeared promising in attracting part-time volunteers who were otherwise difficult to engage.

Increasing the number of field staff and adding layers of supervision helped the sites maintain the level of oversight and support to schools and volunteers that they had before they expanded.

These management structures worked best when supervisors did not have competing responsibilities for other aspects of the program that limited their time to observe the schools directly. Further, new program leadership and inadequate staffing levels sometimes compromised the effectiveness of the site's supervision infrastructure. Finally, promoting from within the organization helped

Executive Summary Table 1
The Expansion Sites at Baseline (2001), Their Four-Year Goals and Actual Numbers (2006)

	Philadelphia *Lead site*			New York *Scale site*			Boston *Scale site*			Cleveland *Growth site*			Washington, DC *Growth site*		
	BASELINE	GOAL	ACTUAL	BASELINE	GOAL	ACTUAL	BASELINE	GOAL	ACTUAL	BASELINE	GOAL	ACTUAL	BASELINE	GOAL	ACTUAL
Number of Volunteers	116	916	538	48	448	327	42	442	383	60	260	253	90	290	160
	BASELINE	GOAL	ACTUAL	BASELINE	GOAL	ACTUAL	BASELINE	GOAL	ACTUAL	BASELINE	GOAL	ACTUAL	BASELINE	GOAL	ACTUAL
Number of Schools	12	40	43	4	20	17	7[a]	20	17	6	16	15	5	16	9

Source: Experience Corps national office

[a] Includes 4 schools and 3 community-based after-school programs at baseline and 13 schools and 4 after-school programs in 2006.

build staff capacity and stability. Structured tutoring programs that included on-site monitoring lent themselves to far greater quality control than other pull-out tutoring approaches. Because opportunities for program staff to observe classrooms were limited, it was much more difficult for staff to monitor the quality of the program when volunteers worked inside the classroom.

Most sites greatly improved their capacity to raise local funds; however, creating a diverse and stable funding base that will allow them to sustain their growth has proven more difficult.

During the four years of the initiative, the sites raised an impressive amount of money, although they differed in the proportion of their budgets they raised themselves—ranging from 17 percent to 74 percent. In general, the sites were most successful in generating support from local foundations. Long-standing relationships with elected officials helped two sites win substantial federal or state earmarked funds, and three sites won federal or state grants. Efforts to raise money from individual donations or corporate grants or sponsors proved more difficult. Further, it was much harder than anticipated for sites to develop contacts within the school district's central leadership that might lead to stable funding from the schools.

Lessons

The experiences of the five sites generated important information about the conditions that can lead to successful expansion. These include the following lessons:

Programs need to be flexible enough to respond to the demands of the external environment while staying true to their core principles—and this can be a difficult balance to maintain.

It is unlikely that an expansion initiative will unfold within a static external environment, and programs will always need to adapt to changes in their local communities. Program models like Experience Corps that are organized around a set of core principles that guide, but do not dictate, specific program strategies have flexibility to adapt to changing conditions. In two sites, for example, access to students for pull-out tutoring—which had been the core program service in both sites—became more limited because of changes in school schedules and literacy curricula. Both sites were able to adapt by moving more volunteers to roles inside the classroom, a significant change in their offerings but one that did not conflict with Experience Corps' principles or focus (i.e., teams of well-trained volunteers helping young children develop literacy skills).

A well-established, well-connected host agency whose leadership fully supports the expansion effort can provide critical resources to programs attempting significant growth.

Small to midsize programs like Experience Corps rarely have the capacity to leverage the resources needed for a major expansion effort unless they are part of a larger organization. Experience Corps sites benefited enormously when they were part of a well-established host agency that considered Experience Corps and its expansion an integral part of the agency's own mission. Being housed in such an agency gave the sites access to resources, expertise and connections that they would not otherwise have had. In addition to providing office space and equipment, supportive host agencies offered administrative support, staff time and expertise for fundraising and development, and help with strategic planning from experienced administrators. Host agency connections in the community also gave the sites access to potential volunteers, and their reputation in the community lent the program credibility with potential funders and schools.

Obtaining renewable funding to sustain growth is a significant challenge.

One of the most daunting challenges programs face after a major expansion effort is raising sufficient funds to sustain their growth once the expansion-grant period ends. Developing a diversified funding base that includes money from multiple sources (e.g., individuals, corporations, and local, state and federal government) requires a sustained and focused effort, expertise in a range of fundraising strategies and relationships with powerful individuals who can champion the program to potential funders.

While the Experience Corps sites raised a relatively large amount of money, they have not yet generally succeeded in diversifying their funding base and finding stable sources of funding. Securing renewable funds from city public school systems may not be feasible in an era in which the school districts themselves are in chronic financial distress. Despite the Experience Corps sites' solid reputations with individual principals and, in some cases, their increased coverage by the local media, only one of the five sites succeeded in forging a relationship with city leaders that led to a grant from the city's Department of Education—and it is not certain whether, and at what level, these funds will be sustained. Stable funding from state and federal governments similarly remains a long-term goal.

The Experience Corps expansion effort also suggests three valuable recommendations for funders, policymakers and other planners about how such initiatives might be structured in the future:

Adopt a rigorous process for determining a program's readiness to expand. Such an effort should include assessments of a program's stability over time, relationships with key agency partners, financial strength and leadership.

The demands of expansion are difficult to anticipate and, in some ways, programs can never be fully prepared. However, the findings from the Experience Corps expansion effort are consistent with those from similar previous efforts regarding the need for programs to have a proven track record before they attempt to expand. The fact that the sites had built a good reputation in the schools was a key factor in enabling them to expand during a time of school reform and budget cutbacks. Internal readiness also proved to be important. One site's progress during the initiative was seriously hampered because its energies were consumed by the need to consolidate recent changes it had made to its structure and operations. In contrast, two other sites were able to adopt a proactive approach to the challenges of expansion because they started with experienced leadership, a tested program and service delivery model, and no serious financial problems.

Establish modest goals and build in time to assess progress and make midcourse corrections as needed.

Staff from the local sites and the Experience Corps national office now agree that the goals for both volunteer enrollment and school expansion were too ambitious, not only because of the challenges involved in attracting more volunteers and adding more schools but because these had an impact

on every other aspect of the program. Bringing in more volunteers required changing procedures and adding staff time for intake, database management and stipend distribution; training larger numbers of volunteers created scheduling and logistical challenges; managing larger numbers of schools and volunteers required increasing the size of the staff and reconfiguring supervisory structures. Addressing these simultaneous demands was exhausting. All sites agree that it would have been extremely valuable to have an interval of time to consolidate what they were learning, identify strengths and weaknesses, and make mid-course corrections without the pressure to grow.

Avoid requirements that force sites to make fundamental changes to their program model in order to meet expansion goals.

During much of the program's history, Civic Ventures had encouraged sites to offer a part-time volunteer alternative to individuals who were not able to commit to the 15 hours a week expected of a full-time volunteer. For the expansion initiative, Civic Ventures required all sites to recruit equal numbers of full- and part-time volunteers. While this created additional complications for all of the sites, it was particularly challenging for the two sites that had previously relied almost exclusively on full-time volunteers with stipends and had little or no prior experience using part-timers—largely because their specific program models did not easily accommodate volunteers working only a few hours a week.

To meet this requirement, the two sites formed partnerships with programs that used part-time volunteers, but the programs they partnered with were based on models that diverged significantly from Experience Corps' core services and did not contribute to the literacy benefits the program is intended to achieve. Any expansion initiative creates intense time- and resource-consuming demands on the programs involved, and planners should limit requirements to those that contribute to achieving the central goals of the expansion.

Concluding Thoughts

Program expansion is a major undertaking. It puts a strain on all aspects of an organization and should be considered only by programs that have evolved well beyond their start-up phase, offer a service that is needed in the community and have reasonable expectations that they can develop or acquire the expertise, financial resources and external relationships they will need to succeed.

Experience Corps showed that successful growth is possible. It requires the flexibility to adapt to changing circumstances while holding fast to what makes the program unique and valuable. Long-term sustainability remains the greatest obstacle to future growth, and convincing policymakers to devote public funds to sustaining even a popular program like Experience Corps may be a significant challenge. However, the Experience Corps expansion initiative clearly demonstrates how programs can become stronger, more energized and even more innovative through carefully planned and managed growth, and thus extend the benefits of their services to larger numbers of individuals and communities.

Executive Summary Endnotes

1 The Bridgespan Group. *Growth of Youth-Serving Organizations.* A white paper commissioned by the Edna McConnell Clark Foundation, March 2005.

2 Robert G. Meyers. *Going to Scale.* A paper prepared for UNICEF for the Second Inter-Agency Meeting on Community-Based Child Development, New York, October 29–31, 1984. Retrieved from http://www.ecdgroup.com/download/ac1gsxxi.pdf May 25, 2007.

3 J. Gregory Dees, Beth B. Anderson and Jane Wei-Skillern. *Pathways to Social Impact: Strategies for Scaling Out Successful Social Innovation.* Duke University Fuqua School of Business, Center for the Advancement of Social Entrepreneurship. CASE Working Paper Series No. 3, August 2002. Retrieved from www.fuqua.duke.edu/centers/case/documents/workingpaper3.pdf June 24, 2007.

4 Nancy Morrow-Howell, professor of social work at Washington University in St. Louis, is conducting additional studies of the Experience Corps program. One is a random assignment study of the program's impacts on students. She is also examining whether and how the program benefits the volunteers.

5 Except for a handful of Experience Corps programs that operated outside of schools during the after-school hours, the program was implemented in schools during the regular school day. Most of the expansion was expected to be to additional schools, although after-school, community-based Experience Corps programs could be "counted" as well.

Introduction

Chapter I

Innovative social programs often begin as small pilot projects. Because there is frequently a great need for these programs, after a period of implementation and model development those that have demonstrated their worth often strive to find the means to expand, or "scale up," to increase the numbers of people they serve. Expansion often entails replicating the program in new locations, but it can also involve efforts to extend the program's reach within its existing locations in order to have a more lasting and significant impact on the communities currently being served.

Expansion poses many new challenges for programs and organizations. In its report on the growth of nonprofit youth-serving organizations, The Bridgespan Group characterized expansion as a "roller coaster ride" that brings organizational, programmatic and financial changes to programs regardless of their initial size.[1] In the midst of these changes, maintaining a program's quality, consistency and integrity to its core principles can be difficult. Expansion inevitably alters the way programs are organized and managed. A strong infrastructure—the set of structures, practices and resources that enables a program to deliver high-quality services and be sustained over time—is essential to the effectiveness of a program. Yet, under the pressure to meet goals for growth and allocate limited resources, programs often struggle to put sufficient infrastructure in place.[2]

An article published by the Center for the Advancement of Social Entrepreneurship at Duke University's Fuqua School of Business identifies five key elements that should be in place before a program can expect to meet these challenges:[3]

- ***Readiness***. A program should be ready to expand. It should have a proven track record, and the organization operating the program should possess—or be able to quickly develop—the skills and capacities, quality control systems and administrative infrastructure needed to achieve its desired growth and to manage a larger program.
- ***Receptivity***. Externally, there should be not merely the need but a demand for the program's services so that the population or institutions that will be the focus of the expansion will be receptive to the program.
- ***Resources***. The larger budgets that come with expansion put increased demands on fundraising. Thus, a program must have a plan for attaining the financial and material resources it will need to grow and sustain that growth.
- ***Risk***. The probability of success should be high, with minimal risks to the program (or the population it serves) should expansion not succeed.
- ***Reward***. There should be identifiable benefits for a program that is undergoing expansion, such as brand recognition, organizational learning and economies of scale.

Experience Corps

In 2001, Experience Corps, a program that recruits older adults as volunteers to help strengthen the literacy and other academic and social skills of children in urban elementary schools, began an ambitious expansion initiative in five of its existing sites. Begun in 1995 as a pilot project at 12 schools in five cities, Experience Corps was designed to address three large issues. First, there are growing numbers of healthy, active older Americans with the time, talent and desire to give: They are a significant untapped social resource, and being active and having a sense of purpose can contribute to their continued physical and mental health.[4] Second, there are many children in struggling public schools who need additional support from a caring adult and, especially, help learning to read. And, third, when people of different generations engage in activities together, their lives can be enriched by sharing the different perspectives that age and youth bring. The energy and spontaneity of children can brighten the lives of older adults, while they in turn can teach children about the possibility of overcoming life's challenges through determination and hard work. Taking part in intergenerational activities may also counter negative stereotypes that some young people have about aging adults.

The Model

In an effort to provide a range of benefits to the children, the schools they attend and the volunteers themselves, the Experience Corps program model was built around a set of basic principles and essential components. At the time the expansion initiative began, they included the following:

- Teams of between 5 and 15 volunteers—called Experience Corps members—are placed in each school to work with children, typically in grades K–3, who are referred by their teachers because they are having difficulty learning to read. The volunteers provide students with one-to-one literacy tutoring outside of the classroom. Depending on the site, volunteers also serve inside the classroom, providing in-class support to individuals and small groups of students in literacy and other academic areas under a teacher's direction.
- Volunteers are asked to make a substantial commitment to the program, working each week throughout the school year. Sites typically offer two service options. Volunteers who serve 15 or more hours a week are considered "full time" and receive a small monthly stipend intended to defray the costs of volunteering (e.g., transportation and lunch) and contribute to meeting the volunteer's own monthly expenses. Volunteers who serve less than 15 hours a week (typically about 5 hours a week) are considered "part time" and are not eligible for a stipend.
- Prior to being placed in a school, volunteers receive training from Experience Corps staff or outside experts in literacy, behavior management, child development and working in schools. Depending on the site, the volunteers may also receive in-service training.
- Having a number of volunteers in each school provides a sense that they are part of a "team," allowing the older adults to talk informally on a regular basis and develop strong and supportive networks of colleagues. In addition, monthly team meetings, facilitated by the school coordinator (an Experience Corps staff, VISTA or AmeriCorps member who manages the program at each school), provide a format for the group to socialize, share experiences and exchange ideas about successful tutoring strategies.
- Having a number of volunteers in each school can also create a critical mass—a presence large enough to have an impact on the climate of the entire school.
- The program also provides opportunities for leadership, with volunteers engaging in the life of the school, changing perceptions about aging and contributing to the program's direction.

Together, these principles and practices are aimed at achieving significant, measurable gains in both student achievement and member well-being.[5]

The Expansion Initiative

By 2001, Experience Corps was operating in 14 cities and had enrolled more than 1,000 volunteers.[6] A signature program of Civic Ventures, a nonprofit organization whose mission is to "lead the call to engage baby boomers as a vital workforce for social change." Experience Corps had refined its model and operations and was developing a track record of successful implementation and benefits to children.[7] The potential for growth was there. A national survey of adults age 50 to 75 conducted for Civic Ventures suggested that many more retired adults would become Experience Corps members if asked.[8] And the program was in great demand by local schools, where teachers and principals valued the members for providing support to children who needed additional attention from a caring adult as well as for helping them with academics.[9] Experience Corps was ready to expand, but it did not have the resources to go beyond serving a relatively small number of children and schools.

Based on the operations of the original set of programs, the strength of the model and its potential to dramatically increase the engagement of older adults in their communities, in 2001, the Robert Wood Johnson Foundation (RWJF) provided Experience Corps with funds for a four-year initiative to expand its reach in 5 of its 14 cities. A short time later, Experience Corps received a second expansion grant from the Atlantic Philanthropies (AP). In addition to funding for the five local sites, the grants also provided support for Civic Ventures to establish an Experience Corps national office in Washington, DC, to guide the expansion initiative and serve as a resource and support for the entire

Experience Corps network. Thus, the grants would not only allow Experience Corps to have a greater impact in the five expansion sites but presented the opportunity for the program to demonstrate its capacity to establish itself as a large-scale, nationwide initiative led by older Americans.

The four-year expansion initiative began in September 2002 and concluded in June 2006.

Site Selection and Expansion Goals

Because of variations in the size and experience of the programs in the network, the five sites that would be chosen to participate in the initiative could not be expected to grow at the same rate. Consequently, Civic Ventures created a goal structure that defined three levels of growth, taking into consideration the capacity of the different sites:

- A single *lead* site would commit to add 800 new volunteers over the four years of expansion, operate at 40 schools[10] and serve at least 5,000 low-income children.
- Two *scale* sites would each add 400 new volunteers, operate at 20 schools and serve at least 2,500 children.
- Two *growth* sites would add 200 new volunteers, operate at 16 schools and serve at least 1,250 children.

Civic Ventures selected the Philadelphia program, which as the largest Experience Corps site was the flagship program for the network, to be the lead site. Each of the other 13 programs was invited to apply for expansion funds as either a scale or growth site. In all, seven programs applied. The criteria Civic Ventures used to select from among the applicants included the quality of the site's expansion plan, organizational commitment and capacity, existing track record of success, community partnerships and relationships with schools, and the presence of local funding partners and prospects for sustained local support. Boston and New York City were selected as scale sites. Cleveland and Washington, DC, were chosen to be growth sites. In selecting Washington, Civic Ventures believed that having an expansion site in the nation's capital, where Experience Corps's new national office would also be located, could serve as a showcase to visiting Congressional representatives and other decision-makers whose policies on aging Civic Ventures hoped to influence.

The lead and scale sites began expansion in 2002, after a three-month planning period. The two growth sites officially began expansion one year later, in 2003, after a year of planning.[11] During the planning phase, the sites developed four-year plans, set annual benchmarks and developed implementation strategies for key elements such as volunteer recruitment, staffing and fundraising.

Civic Ventures stipulated that the sites focus on literacy activities; however, sites could devote up to 20 percent of their services to other areas, such as mentoring or tutoring in other academic subjects, as long as the core principles of the program were followed. Although Civic Ventures provided no formula for the proportion of time volunteers should spend working one-to-one with children, as opposed to working with them in small-group activities, one-to-one tutoring was the preferred approach. Within these parameters, Civic Ventures encouraged innovation by the sites, believing that fresh ideas could be shared and enrich the program overall.

The National Office

The national office's responsibility for monitoring and guiding the five-site expansion effort was part of its larger mission—to help Experience Corps evolve from a network of small programs into a large-scale, nationwide program with an identifiable set of core features. Civic Ventures believed that by building a national presence, Experience Corps would be more likely to gain the prominence necessary to secure sustainable funding.

The national office planned to carry out its mission through a range of activities that included annual conferences for all the Experience Corps sites, where the programs could share lessons learned, collaborate on defining issues and establishing policies, and set strategic direction for the network. In addition, the national office held separate semiannual conferences for the five expansion sites to give them opportunities to share strategies and discuss issues of particular relevance to the challenges of expansion.

Beyond this role, the national office would also provide technical assistance on issues such as recruitment, training, program self-assessment and local sustainability to all 14 sites; educate policymakers at the local, state and federal levels about Experience Corps; and spread the broader message of the valuable contributions older adults can make to communities. Finally, the office expected to turn Experience Corps into a recognizable "brand" by developing a common Experience Corps logo and sets of promotional materials depicting the program's core elements. These materials, in turn, would help local programs market themselves as affiliates of a national initiative to potential partners and funders. The national office would also help raise awareness of Experience Corps by garnering national and local media coverage.

Focus of the Report

For Experience Corps, the process of expanding programs that deployed 40 to 100 volunteers in a small number of schools into programs that involved several hundred volunteers in far more schools was likely to require major changes in core operations, such as volunteer recruitment, school oversight, program management and fundraising. The five sites were likely to face significant challenges as they worked to maintain the integrity of the model and the quality of the program while striving to achieve their expansion goals.

In 2002, RWJF provided funds to Public/Private Ventures (P/PV) to document Experience Corps' expansion efforts as they unfolded in each site over the course of the initiative, particularly how the sites addressed challenges encountered along the way.

Focusing on key elements of the expansion, this report examines the sites' efforts to increase the size of their volunteer pool and expand to additional schools, manage their larger and more complex programs, and raise sufficient funds to meet annual goals and sustain growth. In addressing each issue, we will keep in mind how the sites' initial readiness to expand, the organizational resources they were able to bring to the expansion effort and the receptivity of the external environment (i.e., the local school districts) in which expansion took place all shaped the sites' progress. In drawing together the experiences of the five sites, the conclusion of the report will reflect on whether and how the local sites, and the program as a whole, benefited from the expansion effort.

The report focuses on specific questions in several areas:

- **Achieving growth.** To meet the initiative's numerical goals for volunteers, schools and children served, each site would have to recruit many more volunteers and extend the program to many more schools than they had done in the past. Thus, at this most basic level, to what extent did they succeed? What volunteer recruitment strategies proved most effective? How did they market the program to school principals dealing with the priorities of the newly passed No Child Left Behind legislation?
- **Managing growth.** Achieving growth without sacrificing the quality and integrity of the model would require sites to make changes in program organization and management. What new staffing configurations and supervision practices were created to ensure adequate oversight for the schools and support for the volunteers? To what extent did sites develop the capacity and infrastructure needed to successfully manage their larger and more complex organizations and deliver a high-quality program?
- **Sustaining growth.** To sustain their growth and increase their potential for citywide expansion, the sites would need to find diversified and renewable sources of income and gain the support and commitment from leaders at the city, state and federal levels. How successful were their efforts to raise adequate funds to sustain targeted expansion levels and ensure long-term stability? What organizational resources and external conditions affected the success of local, state and national fundraising efforts?
- **Consequences of growth.** What were the consequences of expansion for individual Experience Corps programs and for the network as a whole? What changes, if any, did the programs have to make to the basic Experience Corps model and core principles to meet expansion goals? In what ways, if any, did the programs benefit from the experience?

More broadly, the experiences of the expansion sites can yield valuable insights that deepen our understanding of the resources and conditions necessary for successful expansion. Thus, the report also addresses the question: What lessons learned from this initiative can inform other expansion efforts?

Research Methods

Data collection for this study of the Experience Corps expansion initiative was carried out between February 2003 and June 2006. The study was designed to provide an in-depth understanding of the sites' experiences as they attempted to achieve, manage and sustain growth within their respective cities. The research methods selected for the study enabled us to document the structure and operations of the sites just prior to expansion, follow their progress at semiannual intervals and record the sites' ultimate success at reaching their expansion goals. Data analysis was geared toward identifying the challenges, strategies and successes that were common across the five sites as well as those that resulted from local conditions. We worked to ensure that the perspectives of all key participant groups were included. The primary sources of data were as follows.

- **Interviews** were carried out during annual visits to the expansion sites and during semiannual phone conversations with Experience Corps program directors and staff from the national office. During site visits, interviews were conducted with Experience Corps and host agency staff and teachers and principals from Experience Corps schools and through focus groups with Experience Corps volunteers. The interviews gathered information about the structure and operations of the local programs before and during expansion, the sites' progress toward meeting their annual expansion benchmarks, the challenges and opportunities that came with expansion, and participants' views of the benefits and drawbacks of expansion.
- **A volunteer intake survey** was administered annually to all volunteers enrolled in the program from September 2003 to January 2006 to gather information on their demographics (e.g., race, gender, age, education level), how they heard about Experience Corps, their reasons for joining and their previous volunteer and professional experience.
- **Semiannual reports and other written materials** submitted to the national office by the expansion sites, documenting their progress toward annual expansion benchmarks, were reviewed on a regular basis.

See the Appendix for more details about our research methods.

Structure of the Report

Chapter II provides an overview of the five expansion sites and the extent of their internal readiness for growth as the expansion got under way in 2002. This initiative took place during a time of significant change in school districts and individual schools, and Chapter III describes how these external conditions affected the sites' efforts to maintain their presence in their current schools as well as expand to new ones. Chapter IV then examines the sites' volunteer recruitment efforts, while Chapter V discusses their efforts to create an infrastructure designed to maintain the quality and consistency of their programs. Chapter VI looks at the key issue of sites' fundraising to help support the expansion while it was taking place and to sustain growth after the four-year initiative—and its significant foundation funding—ended. A final chapter presents conclusions and offers lessons learned.

The Expansion Sites

Chapter II

Because expansion places demands on programs, it stands to reason that it should be undertaken only by those ready to withstand the added stress—that is, programs that have developed effective structures for such basic operations as participant recruitment, staff supervision, program management, service delivery and fundraising. Although rapid growth will require programs to make major changes to these core operations, these changes are more likely to be successful if they are built from a foundation of operational stability and robust organizational capacity.

To provide background for understanding how well each site negotiated the many demands of expansion, this chapter describes sites' readiness to expand as they headed into the four-year initiative. After describing their characteristics at the start of expansion, the chapter addresses the following questions:

- How well positioned was each site's host agency to provide support for expansion?
- How financially stable was each site?
- How mature were the sites' services and how extensive were the tenure and experience of key staff members?

As the chapter will demonstrate, at the start of the initiative the five sites were at different points of readiness in terms of the maturity of their programs and the resources they had to draw upon.

What Were the Sites' Characteristics at the Beginning of the Initiative?

The five programs that participated in the expansion initiative—Philadelphia, New York, Boston, Cleveland and Washington—shared many common features. As Table 1 shows, with the exception of the lead site, Philadelphia, at the start of the initiative the programs were very small. Three sites had roughly between 40 and 60 volunteers, and four sites were providing services in only four to seven schools (or after-school programs).

One key difference among the sites was each program's history of incorporating part-time volunteers. Civic Ventures wanted the expansion sites to include approximately equal numbers of full-time and part-time (unstipended) volunteers.[12] Cleveland, Boston and Washington each had a history of incorporating part-timers into their programs. In contrast, New York had never used part-time volunteers, and Philadelphia's part-timers represented a very small proportion of its volunteer pool. As we discuss in Chapter IV, both faced a dilemma about the best way to bring in large numbers of part-timers to meet the expansion goals in this area.

All five sites had small staffs when expansion began, typically consisting of a full-time program director and between one and five part-time school coordinators. (In Boston and New York, the coordinators were AmeriCorps members.)

Programmatically, the sites had a great deal in common. The core program model in all sites consisted of one-to-one tutoring for which the children, most often in grades K–3, were "pulled out" of their classrooms and tutored in a designated Experience Corps room or other space in the school. In Philadelphia, New York and Washington, roughly a third of the volunteers served as in-class assistants as well.

The materials used by the volunteers in tutoring sessions varied from site to site. In New York and Boston, volunteers used a commercially packaged, structured tutoring curriculum that was developed specifically for nonprofessionals (Reading Coaches in Boston, Book Buddies in New York). In contrast, volunteers in Cleveland and Philadelphia used materials developed by the program and, in Cleveland's case, assigned by the teachers.

Washington's program was structurally different. Since its start in 1999, the site had offered its literacy services by partnering with existing volunteer programs in each of its five schools. Experience Corps recruited volunteer tutors for the partner organizations, who, in turn, trained and managed them. After being accepted as an expansion site, Washington decided to dissolve these partnerships and adopt a single curriculum for all of its tutors. The site discontinued its arrangements with the partner organizations and purchased a literacy curriculum that had originally been designed for use

Table 1
The Expansion Sites at Baseline (2001) and Their Four-Year (2006) Goals

	Philadelphia		New York		Boston		Cleveland		Washington, DC	
Designation	*Lead site*		*Scale site*		*Scale site*		*Growth site*		*Growth site*	
Year Program Started	1996		1996		1998		1997		1999	
Host Agency	Temple University Center for Intergenerational Learning (CIL)		Community Service Society (CSS)		Generations Incorporated		RSVP of Greater Cleveland, Inc.		Civic Ventures	
Number of Volunteers	BASELINE	GOAL[a]	BASELINE	GOAL	BASELINE	GOAL	BASELINE	GOAL	BASELINE	GOAL
Full-Time	93	493	48	248	22	222	30	130	28	128
Part-Time	23	423	0	200	20	220	30	130	62	162
Number of Schools	BASELINE	GOAL	BASELINE	GOAL	BASELINE	GOAL	BASELINE	GOAL	BASELINE	GOAL
	12	40	4	20	7[b]	20	6	16	5	16
Program Model at Baseline	Pull-out tutoring using materials developed by schools, volunteers and program; some in-class assistance		Pull-out tutoring using a commercial tutoring curriculum; some in-class assistance		Pull-out tutoring using a commercial tutoring curriculum		Pull-out tutoring using classroom or program-developed materials		Various pull-out tutoring programs; in-class assistance; male mentoring	

Source: Experience Corps national office for all information except the program model

[a] Numerical goals for volunteers were calculated as the sum of the site's baseline volunteer number plus the number of new volunteers the site was expected to add over the course of the four-year initiative.

[b] Includes four schools and three community-based after-school programs.

by classroom teachers. It hired educational consultants to modify the curriculum and make it easier for the Experience Corps tutors to use. The planning year for the expansion initiative (2002–03) was the first time school coordinators and volunteers would work with the curriculum.

Early in the expansion initiative, there were discussions between Civic Ventures and the sites about whether they should all adopt the same tutoring approach. The question was resolved by allowing sites maximum flexibility to use the approach that best fit their local conditions and school-district requirements.

How Ready Were the Sites to Expand?

Aside from these relatively minor organizational and programmatic differences, each of the expansion sites started the initiative with decidedly different assets and liabilities. The three most important, in terms of how they would affect the course of expansion, were the support that the site's host agency was willing or able to provide to the Experience Corps program, the site's financial health going into expansion and the maturity of the site's services and tenure of key staff. This section describes each site's status regarding these three important factors.

The Host Agencies

Each of the Experience Corps programs was housed within a nonprofit organization (or, in one case, within an organization that was part of a public university) that chose to run the program, according to the nationally guided model, as part of its agency's work. The host agencies could potentially play a crucial role in Experience Corps' expansion. Aside from providing office space and equipment, the agencies had resources, expertise and connections that the individual Experience Corps programs would not have access to on their own.

The host agencies in two of the sites—Cleveland and New York—were medium to large organizations with long histories in their respective communities and connections to local power brokers through their boards, trustees or organizational partnerships. In Cleveland, the host agency was RSVP of Greater Cleveland, Inc. (RSVP), a local Retired and Senior Volunteer Program that is part of a national initiative that enlists older adults to serve as volunteers within their community. The Cleveland RSVP's executive director had brought Experience Corps to the local RSVP and had remained actively involved in the program. New York's Experience Corps was part of a large, well-respected social welfare organization, the Community Service Society of New York (CSS), where the program was housed within CSS's own RSVP program. Each of these two host agencies regarded Experience Corps as an integral part of the agency and incorporated the program's expansion goals into its own strategic goals. This meant that, during expansion, each agency was prepared to commit junior and senior staff members' time to Experience Corps' work, including program oversight, fundraising, advocacy for the program and clerical and accounting support.

Civic Ventures, whose headquarters is in California, had originally served as the host of the Washington, DC, project. At the start of expansion, the newly formed national office assumed this role. Staff from the national office would provide direct oversight of the project's activities and its staff, supervising Washington's new program director, helping the program develop a fundraising plan and subsidizing the cash-strapped site until it raised sufficient funds to support itself fully. However, the Washington site's office was not physically housed within the Experience Corps national office, making it difficult for the host agency to share office resources and administrative staff with the site. (Civic Ventures had always intended for a local nonprofit to "adopt" the Washington program. In 2005, a suitable organization was found and became the new host agency for the program.)

The situation in Philadelphia was more complex. The site's host agency was Temple University's Center for Intergenerational Learning (CIL), which designs, develops and operates intergenerational programs. CIL staff gave Experience Corps accounting assistance and provided general oversight, but within CIL, the program functioned fairly autonomously and was responsible for its own fundraising.

The site also had to operate within the larger administrative structure of Temple, CIL's home and one of Philadelphia's largest universities. (CIL is one of many centers within the university.) There were benefits of being attached to a large university. For example, Experience Corps' director believed that the program's status in the Philadelphia community was enhanced by its association with Temple. Yet there were drawbacks as well. Although CIL was Experience Corps' host agency, the program dealt with the university directly and did not have the level of support from the university that New York received from CSS. Further, Experience Corps had to follow the policies and procedures of the university's development, human resources, grants management and payroll departments to hire new staff, raise funds from foundations or individuals and pay volunteer stipends. Going through these various departments slowed the speed at which Philadelphia could carry out key administrative tasks or respond to fundraising opportunities.

Boston was in a unique situation among the expansion sites. Its host agency, Generations Incorporated, was a small nonprofit organization established in 1991 that was devoted exclusively to intergenerational programming. When the initiative began, Experience Corps was the largest of the organization's three programs; and when, over the next two years, the other two programs were folded into Experience Corps or discontinued, Experience Corps became the agency's only program. While Generations Incorporated retained its own name, the agency and Experience Corps were otherwise indistinguishable.

The Sites' Readiness to Raise Matching Funds

Throughout the four years of the initiative, the sites would receive pass-through grants from Civic Ventures that included the Robert Wood Johnson Foundation (RWJF) and The Atlantic Philanthropies (AP) expansion grants and, except for Boston, federal AmeriCorps funds, which the sites used to help pay stipends to their full-time volunteers.[13] The grants were expected to cover only a portion of sites' operating costs, and at the outset of the expansion initiative, each site presented a plan for raising matching funds during the four years. Importantly, the amount of funds they needed to raise would increase as the number of staff and volunteers grew over the course of the expansion initiative.[14]

When the initiative began, the five sites differed in their readiness to raise matching funds. Three of the sites were in good shape financially. The host agencies in New York and Cleveland had already each raised sufficient matching funds to cover operating costs for at least the first two years of expansion. New York arguably had the most resources to draw on. Just prior to receiving the expansion grant from Civic Ventures, CSS had been given a $1 million donation from an RSVP trustee, which would be used by Experience Corps. Further, a year before expansion, the program had been awarded $250,000 in federal Department of Education earmark funds from a congressman whose district was home to four Experience Corps schools. Even beyond this available funding, the New York site was particularly well positioned because of the strong support of its host agency and the availability of CSS staff to carry out sustained development work. The site also had the advantage of being located in a city that is home to a large number of foundations.

Thanks to similar support from its host agency, the Cleveland site began expansion with two large grants from a local foundation and additional funding from the state's Ohio Reads literacy program through partnerships it had with two of its schools.

Philadelphia also started expansion on relatively firm financial footing. Since its second year of operation (the 1997–98 school year), Philadelphia had been charging schools for the program: each school paid between $3,000 and $15,000 for Experience Corps, depending on the number of volunteers placed and the number of months the school had the program during that academic year. Over the years, school fees had proved to be a dependable and expandable source of income for Philadelphia, although it was vulnerable to changes in school leadership and cuts in individual schools' budgets. Still, with funds from the expansion grant and revenues from the schools, the site anticipated being financially secure for at least the first three years of the initiative.

Boston and Washington, on the other hand, had financial problems that would be challenging throughout the four-year initiative. In Boston, Generations Incorporated had ended the previous year with a deficit. The site started expansion needing to pay off debt and had not raised enough funds to cover Experience Corps's operating costs for the first year. The agency had very few resources to dedicate to Experience Corps and, in fact, was fighting for its own survival. Like Boston, Washington had not been able to raise matching funds to cover its first-year operating costs and, as a result, had to lay off the staff member responsible for overseeing daily operations in the schools. This meant that the newly hired program director had to pick up these duties, leaving her little time for development work. Although these two sites ended the initiative in very different financial situations, finding ways to cut costs and raise funds was a major concern for both organizations throughout expansion and ultimately impeded progress at the Washington site.

Staff Stability and Program Maturity

Because of the strains that accompany sustained expansion, programs whose services and basic operations are still in a state of flux, who have not developed coherent management practices or who have recently undergone major transitions in staffing are likely to have difficulty responding to the many demands of expansion. On the other hand, programs that have attained a measure of maturity and stability will already have a foundation that can support their growth. At the start of the expansion initiative, the five sites were at different points of readiness in terms of the maturity of their programs and the stability of their staff.

Four of the sites (all except Washington) began the initiative with a tutoring program that had been in

place for at least several years and an established structure for supervising and supporting the volunteers in the schools. That structure, in general, included part-time staff, referred to as school coordinators (in some cases AmeriCorps members filled these positions), who provided on-site support for the volunteers and helped administer the program at the school. These individuals were supervised by a staff member, often a field coordinator who oversaw all schools and who, in turn, reported to the program director.

As the initiative began, two aspects of staffing seemed to be of particular importance: stability in program leadership and the staff's level of experience with the program. New York and Cleveland began the initiative with stability in both their leaders and key field staff. Further, even though New York planned to develop a larger and more complex staffing configuration for Experience Corps, it would be built by promoting individuals (its current school coordinators) already with the program.

Boston, Philadelphia and Washington, however, began expansion with new staff in key leadership roles. Generations Incorporated brought on a new executive director a few months before expansion began. Thus, in the first months of the initiative, she had to learn about both the agency and Experience Corps while dealing with all of the issues involved in trying to get the program in a position to meet its ambitious expansion goals. And while Philadelphia had a long-time director, the staff member who had managed the program's daily operations for several years left a few months after the start of the expansion and her replacement was a young professional with limited managerial experience who was new to Experience Corps. During the course of the first year, Philadelphia also filled several new staff positions with young professionals who had no previous connection to Experience Corps. Thus, except for its program director and site coordinators who had been Experience Corps volunteers, Philadelphia's managerial staff were all new.

The Washington site was in the most challenging position. As noted previously, although it had been operating for three years, it was undergoing fundamental change and, thus, was essentially a new program when the expansion initiative started. It faced the rigors of trying to expand while also implementing a new service delivery model and tutoring curriculum and having a new host agency and a new program director.

Thus, at the start of the expansion initiative, the five sites differed in terms of the resources they could expect from their host agencies, their financial health and their program maturity and staff stability. New York and Cleveland started expansion with strengths in all three areas. The strong support those sites received from their host agencies and their financial health made them well positioned as they headed into expansion. Philadelphia and Boston had a mix of assets and potential liabilities: Both sites lacked important resources that could have lent stability and consistency to the transition from relative stasis to rapid growth, including, particularly, the level of host agency support that Cleveland and New York enjoyed. And Washington started expansion as an essentially new program.

Although all these factors were important as the sites began their efforts to expand, they did not entirely determine where they ended up. As we discuss in later chapters, strong program leadership, effective project management and quality control mechanisms, and the capacity for well-planned innovation sometimes compensated for limitations in other areas.

Expanding to New Schools

Chapter III

During the four years of the expansion initiative, each site was expected to triple or quadruple the number of schools in which an Experience Corps program was located—to reach between 1,250 and 5,000 children, depending on the site. This was seen by Civic Ventures and the local sites as the first step toward having enough visibility and impact within a school district to secure sustainable funding from the district and other public and private sources.

In 2001, when Civic Ventures and the local sites were planning the initiative, the program seemed well positioned to expand. In each city, Experience Corps had a good reputation in the schools where it was already operating. Sites almost always received positive feedback from principals and teachers, who believed that the older adult volunteers provided the children with much needed individual attention, guidance and help with reading. Experience Corps asked very little from the schools in terms of volunteer management: Experience Corps staff trained the volunteers and coordinated the program at the school, requiring virtually no additional oversight from school staff. This factor added considerably to the program's attractiveness. One principal remarked that the program "practically runs itself."

As it happened, however, the expansion initiative unfolded during a time of considerable turmoil in the nation's schools. The No Child Left Behind Act (NCLB), passed in 2001, increased the pressure on local school districts to raise students' standardized test scores in reading and math. NCLB accelerated efforts that had been going on for several years in urban school districts to improve students' academic performance by instituting far-reaching changes in school district organization and instructional approach, and these changes, in turn, complicated sites' expansion plans.

Attracting schools to the program ultimately proved to be one of the most successful aspects of the expansion initiative. Nonetheless, the path to success was steep and often difficult. This chapter examines the sites' school expansion efforts by addressing the following questions:

- What were the sites' strategies for expanding to additional schools?
- What changes were taking place in the school districts that affected the expansion efforts?
- How did sites modify their programming in response to these changes in the schools?
- How successful were the sites in reaching their school expansion goals?

What Were the Sites' Strategies for Expanding to New Schools?

Table 2 shows the sites' four-year goals as set forth in their initial proposals to Civic Ventures.[15] The two scale sites planned to be in 20 schools by the end of expansion. For the two growth sites, the number was 16. And the lead site, Philadelphia, planned to be in 40 schools. The sites' goals for the number of children they planned to serve, through either one-to-one tutoring or in-class assistance, are also displayed in Table 2.

Sites balanced preestablished criteria with practical considerations when choosing new schools.
In choosing new schools, all five sites tried to find schools that were easy for older adults to get to, were willing to provide a room for the volunteers, had a high percentage of low-achieving or low-income students (as measured by such indicators as test scores and eligibility for free or reduced-price lunch) and had a principal who embraced the program's mission.

In practice, however, it was difficult to find schools that possessed all of these characteristics. A dearth of free space, building layouts that made it challenging for volunteers with physical limitations to go to classrooms to pick up students for tutoring sessions or schools located atop a hill or blocks away from the nearest public transportation were not uncommon.[16] Further, other considerations were sometimes given priority in selecting schools, such as a request from a principal or school district administrator or, in Philadelphia's case, the need to find schools that could pay for the service.

Table 2
Original Fourth-Year Goals for School Expansion and Total Children Served

Site	Number of schools before expansion	Fourth-year goal	Goal for total number of children served in the 2005–06 school year
Philadelphia *Lead site*	12	40	5,000
New York *Scale site*	4	20	2,500
Boston *Scale site*	7 (including three after-school programs in community-based organizations)	20	2,500
Cleveland *Growth site*	6	16	1,250
Washington, DC *Growth site*	5	16	1,250

Source: Experience Corps national office

Two sites selected schools more strategically.
In addition to using the above criteria to select individual schools, Boston and New York's approach to expansion was strategically designed to demonstrate Experience Corps' potential impact beyond the specific neighborhoods in which it was already operating. Boston decided to target expansion to three of Boston's poorest and most underserved communities—South Boston, Roxbury and Dorchester. Generations Incorporated, Boston's host agency for Experience Corps, hoped that by focusing exclusively on these three areas and increasing the number of schools and children served, it would be able to have an impact on each community as a whole.

New York also considered geography when developing its school expansion strategy, but with a different goal in mind. By the end of the four-year expansion initiative, the site planned to have the program in a small number of schools in each of New York City's five boroughs, believing that this kind of geographical breadth would help it build broad-based political support for its ultimate goal of going to scale citywide. Both Boston and New York remained focused on their geographic strategy throughout the expansion initiative.

During the initiative, the five sites used two major strategies to recruit new schools: contacting schools directly or working through district administrators. Working through district administrators had the advantage of helping the programs identify low-performing schools that were well run, had strong leadership and would be well served by an Experience Corps program. Getting prior approval from a district administrator also made it easier to win the principal's acceptance once the program contacted the school.

What Changes Were Taking Place in the School Districts That Affected the Expansion Efforts?

Urban school districts are almost always in flux. Changes in principals and district leadership, academic curricula and pedagogical approach, school day schedules and the financial status of individual schools or entire districts are common, making it challenging for any school-based program to maintain its footing. Experience Corps programs were affected by several of these kinds of changes. Turnover in principals meant having to reestablish the program in that school with a new principal,

who might or might not want it continued. In some cases, shifts in school or district priorities meant that the Experience Corps one-to-one tutoring model was not valued in the same way or was no longer feasible. Budget cutbacks in school districts and in individual schools sometimes made it impossible for schools that paid for Experience Corps to continue to do so. Such changes created complications for the sites, not just for adding new schools, but for staying in their current ones.

The mandates of NCLB accelerated and intensified change. At different points during the four years of the expansion initiative, school districts in each of the sites experienced one or more of the following: district reorganization and administrative restructuring, including turnover in district leadership; budget cuts at the district level and in individual schools; implementation of "instructional blocks," which changed the structure of the school day; and the introduction of new district-wide reading programs. These changes had implications not only for the program's growth but for its core services and role in the schools.

District reorganization and changes in leadership temporarily slowed school expansion.
The public school systems in New York, Philadelphia and Cleveland underwent major reorganization during the first three years of expansion. One of the first things that New York City's mayor did upon taking office was to implement a more centralized control of the city's schools by reorganizing its 32 local school districts into 10 instructional regions. In Philadelphia, the outgoing school superintendent instituted a similar reorganization of the city's schools, consolidating 21 "clusters" into nine regions. Further, in 2002, as a result of chronically poor test scores, management of 45 of the city's lowest-performing public elementary and middle schools (representing almost half of the schools serving these grades) was turned over to seven for-profit and nonprofit organizations. The reorganization of Cleveland's public schools in 2004–05 was the result of huge budget cuts after a bill to raise taxes failed to pass, resulting in widespread teacher layoffs, shifts in school- and district-level personnel, and school closings. (Neither Boston nor Washington experienced similar restructuring of their public schools during this period.)

The affected Experience Corps sites had long-standing relationships with mid-level school district administrators who had helped them identify and approach promising schools, and the shifts in personnel that resulted from district restructuring interrupted these relationships. Aware of the importance of the school district administrators to their expansion efforts, program directors at the three sites (assisted by host agency staff in Cleveland and New York) wasted no time in developing relationships with the individuals who replaced their former school district contacts. While this was sometimes frustrating and time-consuming and took Experience Corps staff members away from other expansion priorities, they were ultimately successful in making new connections. As a result, the personnel shifts and district reorganization had only minor or temporary effects on the pace of school expansion in the three sites.

Cutbacks in school district and individual school budgets had a larger effect on slowing expansion.
During expansion, schools in Philadelphia and Cleveland experienced cutbacks in their budgets, and these affected the sites in different ways. In Philadelphia, cuts in principal budgets made it more difficult for schools to afford the program and significantly slowed school recruitment during the first two years of the initiative. As a result, the site fell far behind its annual goals. To catch up, the site recruited 18 new schools in Year Three, doubling the size of its program to 36 schools. This put it back on track in terms of its school recruitment goals but, as later chapters will discuss, this rapid growth strained the program's administrative capacity and created challenges for field staff responsible for overseeing the schools.

In Cleveland, district-wide cuts were particularly severe and led to school closings in addition to shifts in school personnel. The uncertainty about which schools were to be closed or which principals would be moved to different schools made it necessary for the site to delay decisions about whether to approach new schools or which schools to approach. One staff member explained: "We want to pick the schools but can't make a decision because they might close or the principals may not be there. Do we stay with the school or follow the principal? We will make a list of potential schools and [delay our decision until] the summer." During

the third expansion year, two of the site's existing schools closed, and it decided to move out of a third because the new principal was not supportive of the program. This meant that if it intended to keep to its original four-year school expansion goal, it would need to recruit seven new schools in the final year of the initiative—three more than it had originally planned.

Scheduling and curriculum reforms decreased sites' access to students.

A different kind of—and potentially more serious—challenge was the restructuring of the school day that was occurring in the public elementary schools in Boston, Philadelphia and New York and limiting the programs' access to students for pull-out tutoring, which was these programs' core service. At different points during the four years of the expansion initiative, public schools in these cities began implementing block scheduling—periods 90 minutes to two hours long that were devoted to instruction in literacy or math. In an attempt to maximize student learning, principals and teachers in many Experience Corps schools did not allow students to be removed from their classrooms during these periods.

Block scheduling sharply reduced the amount of time each day that Experience Corps volunteers could pull students out of class for one-to-one tutoring. This made it difficult for the programs to serve their targeted number of children and for full-time volunteers to complete their 15-hour-a-week time commitment solely through these one-to-one sessions. Making things even more difficult for Experience Corps, the school districts introduced new district-wide reading programs for teachers to use during the literacy blocks. In Philadelphia, principals required that all supplemental instruction, including Experience Corps tutoring, directly support the learning objectives of these new reading programs.

How Did Sites Modify Their Programming in Response to These Changes in the Schools?

In order to survive and grow during this period of rapid school change, the Experience Corps sites had to convince principals and district administrators that the program could help the schools move toward their goal of having all students reading at or above grade level. With the schools' reluctance to allow children to leave their classroom during instructional block periods and their focus on students' receiving full "doses" of the new classroom reading programs, Experience Corps' pull-out tutoring programs in Philadelphia, New York and Boston were suddenly not in harmony with the schools' priorities. The sites' solid reputations and good relationships with their schools were, in part, what helped them meet this challenge. Beyond that, however, they each responded somewhat differently, and with different consequences for their programs.

Among the three sites affected by block scheduling and new reading curricula, two had to modify or fundamentally change their core design.

Although it became more difficult to schedule pull-out sessions around the instructional blocks, New York did not have to adapt its program design to adjust to changes in the schools. Two factors helped make this possible. First, Book Buddies—the curriculum it used for its one-to-one tutoring of first and second graders—had been found to be effective through a random assignment study conducted on students in the site's schools in the South Bronx.[17] These positive findings made it easier for Experience Corps to assure school district administrators and the principals that its pull-out tutoring program was a valuable supplemental service, especially for those students who were struggling to learn to read in their classrooms. In addition, the site did not charge schools for Experience Corps and thus was in a better position to resist requests to change its basic program than it might have been if the schools paid for the services. These two factors also enabled the Experience Corps staff to continue to work with first and second graders rather than meet the schools' requests to tutor students in the upper elementary grades (for whom Book Buddies was not appropriate).

For Philadelphia and Boston, however, adapting to the scheduling and curricular changes in the schools meant modifying their Experience Corps program design. Philadelphia had to make a major change to its program when, after the first year of the expansion initiative, a request came from the schools to have the tutors work exclusively in classrooms. The district had just implemented a new reading curriculum, and principals and teachers were under pressure to show gains in students' reading scores. Because Philadelphia charged schools for its services, the site had to be flexible in

accommodating the schools' request. The program director reported that he kept in constant communication with school principals during the transition to the new curriculum: "We asked, 'What do we need to do? Retrain our volunteers? Work out [new] schedules? Coordinate our materials with the new curriculum? We will.'"

As a result of the changes in the reading curriculum, the site had to quickly shift from a pull-out tutoring model, in which volunteers assessed students' literacy needs and designed tutoring sessions using a variety of literacy-related materials, to an in-class model where volunteers worked with children in the classroom, primarily on teacher-generated assignments. While some principals continued to also allow Experience Corps volunteers to tutor students outside of the classrooms, they had to do so using classroom materials.

Boston did not receive a sudden request from the schools to place all of its volunteers in classrooms, but block scheduling was making it increasingly difficult to schedule time to pull students out of class for one-to-one tutoring. It was clear to the site that it would have to modify its model. Unlike Philadelphia, which had to change its program all at once, Boston had time to pilot new ideas and try them out incrementally.

Boston kept its Reading Coaches pull-out tutoring program but developed two additional program components that did not involve taking children out of their classrooms: Classroom Literacy, which placed Experience Corps volunteers in classrooms to work with small groups or individual children during the 90-minute literacy block; and Lunchtime Mentoring, where volunteers met once a week for 40 minutes with a fourth or fifth grader during the lunch period to read a book together or play literacy-related games, such as a form of Scrabble. Both components were very well received by the schools, and Experience Corps staff quickly added them to other schools. By the last year of the initiative (2005–06), Classroom Literacy was operating in 32 classrooms in nine schools and Lunchtime Mentoring was in six schools. By the end of the expansion initiative, several schools had all three components.

For Boston, having a menu of program components had several benefits. It made it possible for the site to serve more students while also offering a wider range of options to volunteers. For full-time volunteers, being able to serve as a classroom literacy assistant or lunchtime mentor provided service hours beyond those they earned as a Reading Coach, and that made it possible for them to reach the 15 hours a week of service they needed to earn their stipend—with the cutback in the number of hours each week that children could be taken from their classroom for tutoring, these new options took on additional importance. And, finally, having this menu of offerings increased the program's appeal to the schools by allowing principals to choose which components would be most valuable for their particular students, and this put the site in a better position for future expansion.

Changes in the roles of volunteers created the need for sites to revise their training programs.

Although it was challenging to undergo such a rapid change to its model in the midst of a major expansion effort, Philadelphia succeeded in making the transition to an in-class program. The change, however, meant that the site had to revamp its approach to volunteer training to prepare new and returning volunteers to use schools' new reading curriculum and increase their ability to function effectively inside the classroom. Similarly, Boston had to develop three separate training modules to prepare volunteers for Reading Coaches, Classroom Literacy and Lunchtime Mentoring. Having a literacy specialist or training coordinator on their staff helped both sites respond quickly to these new training needs. For example, Philadelphia hired two retired Philadelphia elementary school principals (one a former reading teacher) as part-time staff to design and implement a new volunteer training program that focused on the components of the schools' reading program and on behavior management techniques relevant to volunteers' role in the classroom.

Moving to an in-class model had consequences for volunteer satisfaction and quality control.

The demands and rewards of working inside the classroom are very different than those of one-to-one tutoring, and many of the returning volunteers who had felt great satisfaction tutoring individual children found working in the classroom less satisfying and, at times, overwhelming. Volunteers missed the close relationships that resulted from meeting individually with the same child several

Table 3
School Expansion Goals and Fourth-Year Results

	Number of schools before expansion	Fourth-year goal	Fourth-year results
Philadelphia	12	40	43
New York	4	20	17 (literacy program)[b]
Boston	7[a]	20	17[a]
Cleveland	6	16	15
Washington, DC	5	16	9

Source: Experience Corps national office

[a] At baseline, Boston was in 4 schools and 3 after-school programs in community-based organizations. In 2006, the site was in 13 schools and 4 after-school programs.

[b] In New York, part-time volunteers served in a separate program that was not focused on literacy and generally took place in schools that did not also have the Experience Corps literacy program. (See the following chapter for a fuller discussion.)

times a week over the course of the school year, as well as the satisfaction of seeing the child progress through the graded reading levels of the tutoring program. According to reports from both volunteers and staff, some volunteers made the transition more easily than others. Although new volunteers did not have to make a similar transition, volunteers who worked inside the classroom reported that it could take several weeks to develop a close working relationship with the teacher and clarify their role within the classroom.

The move to an in-class model also had longer-term effects. As discussed more fully in Chapter V, it altered the ways that Experience Corps staff were able to monitor and support the volunteers. When volunteers were meeting one-to-one with students outside the classroom, program staff could directly observe the tutoring sessions and, when necessary, provide constructive feedback and guidance to the volunteers. However, it was much more difficult for staff to provide this level of oversight when volunteers were working in the classroom. Further, because they spent most of their time in the classroom rather than in a room with other Experience Corps volunteers (as volunteers doing pull-out tutoring did), they had fewer opportunities to socialize or share their experiences and strategies with one another—a core program feature that volunteers report as a major source of enjoyment.[18]

How Successful Were the Sites in Reaching Their School Expansion Goals?

As Table 3 illustrates, by the end of the initiative, Boston, New York and Cleveland had nearly met their original four-year goals for increasing the number of schools.[19] They had grown larger than the lead site, Philadelphia, had been before expansion.

Philadelphia exceeded its goals. The site had programs in 43 schools and had grown more than three and a half times its original size. Washington fell wider of its mark, less than doubling its size during the four years of the expansion initiative. Throughout the initiative, Washington continued to struggle to develop a cohesive staff, implement a new and challenging tutoring curriculum, and raise sufficient funds. Believing that adding more than one or two schools a year would put too much stress on an already fragile infrastructure, the program director chose to lower her numeric goals for expansion and focus instead on building the site's internal capacity.

The changes in the local school districts described earlier in this chapter could have derailed the expansion efforts and, in the most affected sites, even destroyed the program. While school change made the expansion much more challenging, by the end of the initiative the sites were ultimately successful. The effects of the budget cuts continued to rock the schools in Cleveland throughout the third and into the fourth year of expansion. In this context, the fact that it ended the initiative only one school short of its original goal is a notable achievement.

The sites' ability to ride the crest of the tidal wave of school changes was undoubtedly helped by the fact that Experience Corps was well-regarded by its host schools, which typically stayed with the program from one year to the next. Even in Philadelphia, where principals had to pay up to $15,000 a year for the program, there was little attrition among schools from year to year. Across the sites, all of the school staff we spoke with were convinced that the children and the school benefited from the program. These staff liked the fact that the volunteers were older adults, not least because they felt older adults could provide nurturing individual attention to needy children and help instill respectful behavior. Teachers especially valued the in-class volunteers because they provided much-needed help. Principals also appreciated the fact that Experience Corps coordinators were available to monitor the program and support the volunteers, requiring little additional oversight from school staff.

Because of the appeal of the program and the flexibility of Experience Corps staff, it was not difficult for the sites to attract new schools to the program. Recruiting teams of volunteers to fill the schools proved more of a challenge, as we discuss in the next chapter.

Increasing the Number of Volunteers

Chapter IV

Civic Ventures set ambitious goals for increasing the number of volunteers in the five expansion sites. At the beginning of the initiative, even the largest site was relatively small. Including both full- and part-time Experience Corps members, Philadelphia had 116 volunteers, while the numbers in the other sites ranged from 42 in Boston to 90 in Washington. By the end of the four-year initiative, Philadelphia was expected to have enrolled 800 additional volunteers; the two scale sites, New York and Boston, were to add 400 each; and the two growth sites, Cleveland and Washington, were to grow by 200 volunteers each. Civic Ventures also modified its expectations for the balance of full- and part-time volunteers, requesting that half of the new volunteers serve full time—that is, 15 hours a week—and receive a stipend (roughly $200 per month) and half serve as part-time volunteers, usually serving about five hours a week, with no stipend.[20]

To adhere to key elements of the Experience Corps model, it was important for sites to be adding volunteers in synchrony with their expansion to new schools. It would mean that the sites could continue to place enough volunteers in each school (roughly 10) to create a cohesive team whose interactions could enhance the social networks of each individual member. In addition, maintaining teams of 10 meant that the number of volunteers in each school would achieve a "critical mass" capable of serving a substantial percentage of children in the targeted grades and potentially contributing to a more nurturing school environment.

This chapter first describes the characteristics of the volunteers who enrolled in the Experience Corps programs. It then addresses the following questions:

- What challenges did the sites face in recruiting large numbers of volunteers?
- How successful were the sites in reaching their recruitment goals?
- What recruitment strategies were most effective?
- What was the role of stipends in attracting full-time volunteers?
- How did sites address the particular challenges of recruiting part-time volunteers?

A final section briefly discusses sites' efforts to develop the infrastructure necessary to recruit this large number of new volunteers.

Who Were the Volunteers?

A brief intake survey was administered annually to all volunteers enrolled in the program from September 2003 to January 2006 to gather information on their demographics (e.g., race, gender, age, education level), how they heard about Experience Corps, their reasons for joining and their previous volunteer and professional experience.[21] Table 4 displays these demographics.

The volunteers ranged in age from their 50s to their 80s, with almost half (48 percent) from 61 to 70 years old. They were overwhelmingly female (85 percent) and predominantly African American (70 percent). In terms of their marital status, slightly more than 30 percent were married and living with their spouse. The other 70 percent were either single (never married), separated, widowed or divorced.

As a group, the volunteers were well-educated. About a third had earned a bachelor's degree or higher (compared to slightly more than 25 percent of the general population in 2006),[22] and another 38 percent had some post secondary education. They also had experience relevant to Experience Corps: More than three quarters had previously worked with children either as a volunteer or as a professional (e.g., teacher, tutor, coach or mentor). Further analysis showed that 17 percent were retired teachers, 33 percent said they had been a volunteer tutor and 24 percent had been volunteer mentors. Importantly, almost 30 percent of volunteers came into the program with no prior sustained volunteer experience in at least the past 10 years. This last finding is good news for a program that is trying to introduce increasing numbers of older adults to the rewards of sustained volunteer service.

Table 4
Demographic Characteristics of Volunteers

	Full-Time n = 693 (60%)	Part-Time n = 457 (40%)	All n = 1,150
Age			
50–60	24%	29%	26%
61–70	51%	45%	48%
71–80	24%	23%	24%
81+	1%	3%	2%
Gender			
Male	10%	21%	15%
Female	90%	79%	85%
Ethnicity			
African American	85%	47%	70%
White (non-Hispanic)	11%	50%	27%
Hispanic	1%	1%	1%
Other	3%	2%	2%
Education			
High school or less	36%	17%	28%
Some higher ed	43%	30%	38%
College grad or more	22%	53%	34%
Marital Status			
Married, living with spouse	24%	41%	31%
Widowed, divorced, single (never married), married but separated	76%	60%	70%
Experience			
Prior professional or volunteer experience with children	79%	78%	79%
No sustained (four months or more) volunteer experience in at least 10 years	30%	26%	29%

Table 4 also shows that there were several demographic differences between the full-time volunteers, who represented 60 percent of the survey participants, and part-time volunteers. Men were more likely to volunteer part-time than full-time: Twenty-one percent of part-time volunteers were men, compared with 10 percent of full-timers. Full-time volunteers were predominantly African American (85 percent), while part-time volunteers were split almost evenly between African American and white (47 percent vs. 50 percent).[23] A smaller proportion of full-time volunteers was married and living with a spouse, compared to part-timers (24 percent vs. 41 percent). Also, as a group, full-time volunteers had less education than part-timers. While over half (53 percent)

of part-time volunteers had earned a college degree, this was true for less than a quarter (22 percent) of full-time volunteers.

What Challenges Did the Sites Face in Recruiting Large Numbers of Volunteers?

The sites faced several large challenges in reaching their recruitment goals. None of the Experience Corps expansion sites had ever attempted such a large and rapid increase in size. The programs had mainly recruited new volunteers to replace those they had lost from the previous year. Given their small size and the reportedly high return rate of the volunteers (a 70- to 80-percent yearly return rate), the number of volunteers they needed to recruit in a given year was small. In this context, recruitment goals for the expansion initiative were quite ambitious. For example, New York and Boston, each starting with less than 50 volunteers, committed to adding 100 volunteers (about half of them full-time and half part-time) in the first year alone. There were no "proven" recruitment strategies they could rely on for success at this scale.

It was also unclear to the program directors what staffing levels and administrative systems they would need in order to recruit, process and keep track of increasingly large numbers of volunteers. For example, at the start of the initiative, not all sites had a computerized database for tracking volunteers through the many steps from initial contact to training and school placement. Further, only three of the five expansion sites had consistently used part-timers. At the beginning of the expansion initiative, just under 20 percent of Philadelphia's volunteers were part-timers, and New York had no part-time volunteers at all.

How Successful Were the Sites in Reaching Their Recruitment Goals?

Table 5 shows the baseline, fourth-year expansion goal and actual number of volunteers who were active during the fourth year for each of the five sites.

By the end of the initiative, Cleveland had essentially reached its goal and Boston and New York came close. Although Philadelphia fell short of its goal, the site counted more than 530 volunteers by the end of the initiative, almost five times as many as it had at baseline. In fact, comparing the size of their volunteer pool in the year before expansion with their fourth-year numbers, the growth achieved by Philadelphia, Boston, New York and Cleveland is quite impressive. Boston achieved the largest growth, with nine times as many volunteers in the fourth year of expansion as in the year before expansion. In Washington, growth was slowed by the many changes and internal difficulties that the site was experiencing and that were described earlier in the report.

Throughout the initiative, program staff reported that it was much more difficult to recruit part-time volunteers than full-timers. However, despite the added effort it may have taken, Boston reached 90 percent of its target for part-timers, while Cleveland reached 80 percent. Later in this chapter, we discuss how some sites modified the Experience Corps framework to be able to include more part-time volunteers.

Sites' expansion to new schools outpaced their addition of new volunteers; as a result, the program started with only small teams of volunteers in some of the new schools.

The sites were able to maintain teams of at least 10 volunteers in schools they had been working with since before the expansion initiative began, largely because most returning volunteers wanted to continue to serve at the same school from year to year. However, newly added schools were often ready to receive Experience Corps before a full team had been recruited to serve there. Further, many of these schools were particularly difficult to fill because they were located in what were typically perceived as high-crime areas. Recruiting from the schools' immediate neighborhoods, which were generally highly impoverished areas, was very difficult, and volunteers from other parts of the city were reluctant to go into these schools. Philadelphia, for example, experienced this problem in Year Three when the site doubled in size from 18 to 36 schools, with some of the new schools in a section of the city notorious for its youth gangs and high rates of crime. The site had considerable difficulty recruiting a full team of 10 volunteers to serve in these schools.[24] Boston and Washington experienced similar problems.

Table 5
All Volunteers (Full- and Part-Time) at Baseline and in Year Four of the Expansion

Site	Full-Time			Part-Time			Total		
	BASELINE	FOURTH YEAR GOAL	FOURTH YEAR ACTUAL	BASELINE	FOURTH YEAR GOAL	FOURTH YEAR ACTUAL	BASELINE	FOURTH YEAR GOAL	FOURTH YEAR ACTUAL
Philadelphia	93	493	358	23	423	180	116	916	538
New York	48	248	166	0	200	161	48	448	327
Boston	22	222	181	20	220	202	42	442	383
Cleveland	30	130	150	30	130	103	60	260	253
Washington, DC	28	128	57	62	162	103	90	290	160

Source: Experience Corps national office. Goals for volunteer enrollment were defined as the number of volunteers that each site would enroll by the end of the four-year expansion initiative in addition to their baseline number.

In all of these cases, the sites preferred to serve children with a small team rather than delay starting the program until a full team was recruited. Staff members believed that delays would leave schools feeling let down and also risk the loss of volunteers waiting to be assigned. As a result, new schools sometimes opened with as few as three to five volunteers, with sites hoping they would be able to add volunteers to achieve critical mass over time.

What Recruitment Strategies Were Most Effective?

The demands of rapid expansion required sites to adopt a range of strategies to attract as many people to their programs as possible. Sites had always done the heaviest recruitment during the summer and early fall, but they quickly realized that they needed to extend their recruitment season and recruit throughout the year to reach their goals. Thus, with expansion, the duration and intensity of the sites' efforts changed dramatically. At times, as this description by one site's volunteer recruitment coordinator suggests, the demands could feel overwhelming:

I have used everything. The AARP letter [was mailed to 5,000 AARP members]. I put paid ads in the classified section of [the major city newspaper] and sent out notices to every local newspaper that I know about. I sent a public service announcement to every radio station. I tried paid radio ads. We, at one point, made TV spots and sent those out to stations who would take them. We tried to get someone to be interviewed on radio—this year we had three radio interviews. We were successful getting an interview on TV. I sent out an email to as many local groups as I could—neighborhood groups and associations—asking them to advertise [Experience Corps] in their newsletter, or [asking if] I [could] speak to the neighborhood groups—so [we also did] speaking engagements. We did a mailing to all the churches in the vicinity of all of our schools, again asking them if someone could come and speak at the church or [asking to put an ad] in their newsletters. I have gone to churches myself. Every summer we do mailings to libraries and send posters to be hung up. I have tried to make links with [other] organizations, but it is very time-consuming and very hard. We tried to connect with Verizon as well. They have a retirees group.

This recruitment coordinator's range of efforts was fairly typical across the sites. While they may have focused more on one method than another, the sites generally used an array of informal and formal strategies. These included:

- **Word of mouth—which took place both spontaneously and by design.** All of the sites reported that word of mouth was one of the most common ways volunteers came to the program. Realizing the value of current volunteers in attracting others to the program, some sites tried to formalize this role by, for example, hosting a "bring a friend" event or offering a $50 incentive to volunteers who enrolled a friend. Even if they did not use volunteers in a formal role for recruitment, staff regularly encouraged their current Experience Corps members to informally spread the word about the program and often provided them with materials to hand out to interested parties.
- **Mass mailings to AARP members.** Through a longstanding partnership between Civic Ventures and the American Association of Retired People (AARP), all of the Experience Corps sites could use AARP's newsletters, mailing lists and website—free of charge in most cases—to advertise Experience Corps' volunteer opportunities. Through this arrangement, AARP also sent Experience Corps recruitment letters to all its members, either citywide or to targeted ZIP codes. AARP mailings proved to be a fruitful recruitment tool in three sites. The effectiveness of the strategy, however, could create challenges as sites struggled to keep up with the hundreds of phone calls from potential volunteers that followed mailings.
- **Advertisements and notices in newspapers and newsletters**. Sites placed ads in the major newspapers in their cities and notices in community newspapers and newsletters of churches and other community groups and organizations. However, according to one project manager, placing ads large enough to attract attention was expensive and had to be done strategically.
- **Active community outreach by Experience Corp staff.** This form of recruitment was time-consuming and labor-intensive, requiring sites to set up information booths at community events, give formal presentations to various community groups and develop relationships with local organizations or groups that had ties to active retirees. Nonetheless, it was a core recruitment strategy, and it was especially important in reaching individuals who might not be reached by mass mailings or word of mouth, or who would more readily respond to personal contact with a recruiter.

Table 6
How Volunteers Heard About Experience Corps

	Percent of volunteers reporting that they heard about Experience Corps through each recruitment source[a] n = 1,283
Friend, family member	27%
AARP	22%
Newspaper, magazine	22%
An Experience Corps member	18%
An Experience Corps recruiter	11%
Experience Corps poster/brochure	2%
Radio or TV ad	2%

[a] Volunteers could choose more than one response.

One aspect of this strategy was to focus on specific communities. Experience Corps wanted to strengthen ties between local schools and their communities, so sites tried to recruit volunteers who lived in the neighborhoods of the schools in which they would serve. In addition, at least one site coordinated its community-level strategies and mass mailings to maximize the effectiveness of its community outreach.

- **Marketing and media campaigns.** Using funds from a grant from the US Department of Health and Human Services Administration on Aging (AOA), the national office developed promotional materials—including highly professional brochures and posters—for all of the Experience Corps sites (not just the expansion sites) to use. The materials also carried the new Experience Corps logo that the national office designed as part of its national "branding" effort to include all local programs under a common identity and the logo of the local host agency. The expansion sites also used AOA funds for marketing efforts that included public service announcements on TV and radio, painted signs on the sides of public buses and posters placed in highly visible public places.

The recruitment strategies had varying degrees of effectiveness.

Table 6, based on data from P/PV's volunteer intake survey, shows that the most common ways volunteers heard about Experience Corps were word of mouth (i.e., from a family member, friend or acquaintance), recruitment letters sent out through AARP, and advertisements or articles in the print media. Hearing about the program from an Experience Corps volunteer also proved important, while sites' staff recruiters were effective in attracting a little more than 10 percent of the volunteers. Promotional materials and radio and television ads appeared to have fewer direct benefits. Only 2 percent of surveyed volunteers reporting hearing about Experience Corps in either of those ways.

Active support from a well-connected host agency was extremely helpful to sites' recruitment efforts.

Cleveland and New York received assistance for volunteer recruitment and intake from their host agencies. RSVP of Greater Cleveland, Inc., for example, helped its Experience Corps program by directing its staff and office volunteers to refer inquiries about volunteer opportunities to Experience Corps staff.

New York's Experience Corps had the advantage of being connected to both CSS (its host agency) and RSVP, the program within CSS that served as Experience Corps's "home." When developing its expansion plan, Experience Corps chose to expand to communities where RSVP and CSS had strong relationships with local agencies through which the program could recruit volunteers. Because many of the site's recruitment efforts occurred at the community level—whether through ads in local newspapers and newsletters, presentations to community groups and organizations, or information tables set up at local events—these kinds of connections with, and knowledge of, local communities contributed to its success in recruiting volunteers from the general neighborhoods of the schools. To increase Experience Corps's visibility and help with recruitment, the CEO of CSS also wrote a column about Experience Corps in one of Harlem's local papers when the site opened at new schools in that community.

What Was the Role of Stipends in Attracting Full-Time Volunteers?

Since its inception, Experience Corps has relied on stipended volunteers who provide a consistent presence for children by serving in the schools three or four days each week for a total of 15 hours. While the stipends are small—they ranged from $180 to $300 a month during the four years of expansion, depending on the city and the source of the stipend—they help to defray the daily costs of volunteering (for example, transportation, supplementary tutoring materials and lunch), making it feasible for volunteers to make such substantial and sustained time commitments.

Our data strongly suggest that these stipends were instrumental in attracting the volunteers.

Interviews with full-time volunteers indicate that while the stipend was not the primary reason why they opted for the 15-hour-a-week commitment, it was an important incentive—the stipends were a highly valued source of additional income for many of them.[25] Typical of their responses are those given

by three full-time volunteers in a focus group in Boston, who were asked how important the stipends were in their decision to join Experience Corps:

> *I have to be honest. It does help.*
>
> *We can all use the extra money, so it is like assistance, but it is not the reason [we joined].*
>
> *It helps a great deal, because our rent and our medication copay goes up.*

This is consistent with data from the intake survey suggesting that full-time volunteers—who were less likely to be well-educated and more likely to be single and female—may have been less well-off financially than their part-time counterparts.

When asked whether people would volunteer for so many hours without a stipend, one program director remarked that a proportion might continue to volunteer at a reduced number of hours, but many would stop altogether:

> *We have had folks tell us very vocally that they cannot survive without the stipend. There is a group that this is essential for their income; and even among them, there are some that had to make a choice between this and other income-producing activity.*

As important as the stipends were, they also created complications for the sites.

Four sites relied heavily on AmeriCorps grants to support their stipends, and volunteers are only eligible to receive AmeriCorps funds for two years. To retain members for whom the stipend was a needed incentive, the sites had to find another source of funding to pay for the stipend. Three of the sites did this, primarily using foundation grants—in addition to AmeriCorps—to keep volunteers for longer periods of time. In the one site that paid for stipends exclusively through AmeriCorps funds, full-time volunteers could continue as unstipended part-timers once they had reached their two-year AmeriCorps limit. However, they typically chose not to do so and instead left the program, very possibly because they needed to find another source of income.

How Did Sites Address the Particular Challenges of Recruiting Part-Time Volunteers?

Volunteering full-time (15 hours a week) for Experience Corps required individuals to dedicate a significant amount of their time to the program, and not everyone who was interested in volunteering could, or wanted to, commit to this much time. For much of the program's history, Civic Ventures had encouraged sites to offer a part-time volunteer alternative, and each of the five expansion sites was expected to recruit equal numbers of full- and part-time volunteers during the four-year initiative.

Sites began the expansion initiative with very dissimilar ratios of full- to part-time volunteers, a discrepancy that was, to some extent, a function of the degree to which their specific program model did or did not lend itself to incorporating part-timers. Boston, Cleveland and Washington used an Experience Corps model that made it possible for part-time volunteers to provide the same literacy services—primarily one-to-one tutoring with children—as the full-time volunteers, but for fewer hours a week. The volunteer programs that Washington had been partnering with in each of its schools only required volunteers to come one or two days a week—ideal for part-time volunteers—and this is a probable reason why the site began expansion with more than twice as many part-timers as full-timers. However, New York's literacy model could not accommodate part-time volunteers, and Philadelphia did not have a history of integrating part-timers into its program. Civic Ventures' expectation that sites would have to recruit equal numbers of full- and part-time volunteers for expansion thus created particular problems for these two sites, even beyond the challenges that all sites faced in recruiting part-timers.

Sites that had little or no history with part-time volunteers formed partnerships with existing programs to meet expansion requirements.

New York and Philadelphia were faced with decisions about how to adjust their model to meet the stipulations of the expansion initiative. Program leadership in both sites chose to bring in preexisting programs that used older adults as part-time volunteers. Although this strategy helped the sites come closer to their recruitment goals, the models of the existing programs diverged significantly from

that of Experience Corps. Therefore, this strategy did little toward accomplishing the ultimate purpose of expansion, which was to increase the number of volunteers, children and schools that were affected by the core elements of Experience Corps.

In New York, host agency staff incorporated another of their RSVP programs, the Prejudice Reduction Program (PRP), under the Experience Corps umbrella. The older adults who serve as PRP volunteers typically spend two to four hours a week in the schools, where they deliver a curriculum to students in kindergarten to fifth grade that is designed to increase their understanding of cultural diversity. Once the expansion initiative started, the site considered PRP part of Experience Corps and counted its volunteers as part-time Experience Corps volunteers. Philadelphia used a similar strategy, developing a partnership with a local intergenerational program, Reading Buddies. As in New York, the partnership enabled the Philadelphia site to count the Reading Buddies adults as part-time Experience Corps volunteers. However, although the program is organized around literacy activities, Reading Buddies is not a tutoring program. Rather, children from local elementary schools are bused to a senior housing facility once a week to read with the adult residents. Further, few opportunities for contact between Reading Buddies and Experience Corps in-school volunteers existed.

Providing partial stipends appeared to be effective in attracting more part-time volunteers.

Even sites whose models had always accommodated part-timers had difficulty attracting them in sufficient numbers to reach their recruitment goals. One approach to this problem, which the Boston site tried, was to offer financial incentives in the form of reduced stipends for part-time volunteers.[26] Beginning in Year Three of the expansion, the site modified its stipend system to include two levels—in addition to the full stipend for 15 hours a week of service, it offered a reduced stipend to volunteers who served 10 hours a week. (Volunteers serving fewer than 10 hours a week received no stipend.) This strategy provided more options for potential volunteers, and the staff reported that it succeeded in bringing in additional people, although they were not able to provide us with a breakdown of the number of volunteers who received a reduced stipend, limiting our ability to gauge its effectiveness more accurately.[27]

The fact that Boston's Experience Corps program included three options for volunteer activities made it relatively easy to develop this new level of 10 hours of service a week. As noted in the previous chapter, the Boston volunteers could serve as Reading Coaches or in the program's newer Classroom Literacy or Lunchtime Mentoring components—or in some combination of these activities. While Boston had added the new components to its program in large part as a response to changing needs in the schools, it also had the benefit of increasing volunteers' options in combining activities into a schedule of 10 (or 15 for full-time volunteers) hours of service each week.

What Infrastructure Did Sites Need to Develop to Recruit This Large Number of Volunteers?

Along with nearly year-round recruitment activities, volunteer intake was a labor-intensive undertaking for sites attempting to add 50 to 200 new members a year, particularly when they were inundated with a few hundred calls after a mass mailing. Most sites underestimated the amount of staff time that was required. For each potential volunteer who expressed an interest in Experience Corps, the program had to mail out an application, schedule an in-person interview and conduct a background check if the person applied, notify the volunteer of training dates and arrange the volunteer's placement in a specific school. It was important to follow up at each point to avoid losing interested recruits. It was also essential to thoroughly screen each applicant through the interview, background check and training process to identify potential volunteers who might not be appropriate for the program.

Even sites that had designated a full- or part-time position for volunteer recruitment and management needed additional help during peak recruitment season—typically from July and August through late September—when they received the largest number of inquiries and applications and had the shortest time to get everything done (including training and placement) before the program started. Sites that had a well-resourced and supportive host agency could rely on getting administrative support from host agency staff, but those that did not had to pull that extra support from their own staff and current volunteers.

Sites needed to put into place the infrastructure to manage this large influx of new volunteers—and to be sure they were continuing to deliver high-quality services in the schools. This was challenging given the steady pace of growth during the initiative. Most of the sites were expected to at least double in size the first year and continue to grow rapidly in the following three years. To deal with their growth, sites improved their computerized database capacity and devised more streamlined and coordinated administrative processes. They also had to determine what additional staff and new staffing structures they needed, and could afford, to manage increased numbers of volunteers and ensure the quality of the services they were providing. The following chapter describes sites' efforts in this area.

Managing Larger Programs

Chapter V

One of the hallmarks of Expansion Corps, and a major factor responsible for its good standing with the schools, was the degree of on-site management and support for volunteers that the program provided. The challenge the sites faced was to provide the same level of support to, for example, 200 volunteers in 20 schools as they had provided to 50 volunteers in 4 schools—and to do it in the most cost-efficient way possible. The staffing levels and configurations, supervision structures and monitoring practices needed to ensure smooth program operations when Experience Corps was in a handful of schools were not likely to be as effective when the program tripled or quadrupled in size. As the program grew, it was also important to maintain the personalized support that helped volunteers feel appreciated by and connected to the program.[28] Further, the importance of continually proving the program's usefulness to schools, the sites' drive for a sustainable source of income, greater national attention for Experience Corps and the sites' determination to grow without sacrificing quality all intensified the need for quality-control mechanisms that kept pace with the program's rate of growth. The sites had to develop an expandable infrastructure that was capable of managing the addition of new schools and volunteers.

Along with the increase in the number of schools and volunteers the sites managed and supported, other changes were occurring that affected programs' specific infrastructure needs. As we saw in Chapter III, more volunteers were working with children in their classes and doing less one-to-one tutoring outside of the classroom. This had implications for the type and level of on-site management that was possible and necessary to support the volunteers and coordinate the program at the school.

This chapter examines the steps the sites took to continue to provide management at the schools and maintain the quality and consistency of their growing programs. The Experience Corps staff who were most responsible for making sure things ran smoothly at the school were the school coordinators. Thus, the chapter begins with a description of that role. The chapter then addresses the following questions:

- How did programs modify their staffing configurations to provide adequate levels of school oversight as they expanded?
- How effective were these new configurations in helping to maintain the quality and consistency of the programs?
- How did school coordinators monitor the quality of the volunteers' services? What quality-control issues remain unresolved?

On the whole, we found that—despite some gaps and redundancies in the supervisory infrastructure that sites put into place—the programs remained remarkably robust, and the difficulties that we report in this chapter were not serious enough to cause major disruptions in services. One reason for this, we believe, was the commitment and steadiness of the volunteers themselves, who were able to carry on their work with the children despite the changes occurring in the schools or the Experience Corps program. Nonetheless, sites experienced rocky patches, and some sites struggled more than others to maintain the quality and consistency of their programs.

What Was the Role of the School Coordinator Prior to Expansion?

As the link between the school staff, the Experience Corps staff and the volunteers, school coordinators served many important functions. In sites where volunteers tutored students outside of the classroom, the coordinators worked with teachers to recruit students, matched volunteers to students and, in some sites, tested students to determine their initial reading level and progress through the program. They also had to communicate closely with school staff about classroom schedule changes that would affect the volunteers' day. In programs where volunteers spent time inside the classroom, the coordinators were responsible for checking with both the teachers and the volunteers to make sure their working relationship was satisfactory and productive.

Beyond those responsibilities, the coordinator checked in with the volunteers, often daily, to make sure they felt welcomed and comfortable

in the school and had the materials they needed, facilitated monthly meetings of the volunteers to reinforce a spirit of teamwork, relayed information from other Experience Corps staff, and guided discussions of effective tutoring and behavior management strategies. In addition, coordinators had an administrative role, such as documenting student attendance, scheduling tutoring sessions and collecting the volunteers' weekly timesheets, which were required for AmeriCorps-funded volunteer stipends. At some sites, they also tutored students or worked with students whose volunteer was absent.

Boston and Philadelphia also had a designated volunteer at each school who assisted the coordinator. Called a "team leader," the volunteer helped with administrative tasks such as making sure all members of the team completed their weekly timesheets, developed lesson plans for the daily tutoring sessions and informed the coordinator of any issues or concerns that were brought to her or his attention by school staff or other volunteers.

The amount of time that the coordinator spent at the school depended on the site's tutoring program. The structured commercial tutoring curricula in use in Boston and New York stipulated that a coordinator monitor the tutoring sessions. Therefore, in these two sites the school coordinator was responsible for a single school and stayed with the volunteers, typically in an Experience Corps tutoring room, throughout the day. In contrast, in Philadelphia, Cleveland and Washington, coordinators were assigned responsibility for two to four schools and visited each one daily or several times a week.

How Did Programs Modify Their Staffing Configurations to Provide Adequate School Oversight as They Expanded?

Recognizing the pivotal role the school coordinator played in keeping the program running smoothly, the five sites added coordinators as they added schools (or groups of schools) during expansion. In doing so, they were able to keep roughly the same ratio of coordinator to schools as they had before they expanded. At the same time, however, the increase in schools led sites to adopt more complex staffing structures.

Before expansion, there were no more than five coordinators in any site and they were supervised by the program director—or, in some cases, a field coordinator who also visited each of the schools, adding a layer of oversight and support to that which the school coordinator provided. In planning for expansion, the sites realized that as the number of Experience Corps schools and coordinators increased, it would become difficult for the program director or field coordinator to oversee them all as they had when the programs were small. Consequently, four of the sites decided to group their schools by region and add a layer of managers to oversee the schools and school coordinators in one or more regions.[29] The regional managers were expected to be in frequent contact with the school coordinators to keep abreast of any developments and help resolve problems in program operations at the schools or with the volunteers. They also were expected to periodically visit the schools to ascertain that things were running smoothly and communicate any major issues to Experience Corps staff at the office. Structurally, the main difference between the sites was the number of schools that each regional manager was responsible for, which ranged from about 2 in Washington to between 10 and 12 in Philadelphia.

Boston and New York had one additional layer of supervision. In both sites, each school coordinator was based in and responsible for a single school. At the next level, lead coordinators oversaw two to four schools each, depending on the site, and provided support to their school coordinators. (In New York, the lead coordinator was also responsible for the direct management of his or her own school and thus had a dual role.) Above them in the hierarchy, regional managers oversaw six to eight schools and supervised their coordinators.

How Effective Were These New Configurations in Helping to Maintain the Quality and Consistency of the Programs?

This strategy was implemented more effectively in some sites than in others, depending on a variety of factors.

Support to schools and coordinators was most consistent if regional managers were not assigned multiple and competing responsibilities.

As in many organizations whose limited budgets require staff to perform more than a single role, regional managers in Philadelphia and New York had multiple responsibilities, limiting the time they could devote to supervision. Regional managers in Philadelphia reported that they had major tasks, such as database management and other projects, that sometimes took them away from their supervisory responsibilities. New York regional managers similarly noted that they were unable to visit the schools under their watch as often as they had expected to. In addition, in both of the sites some schools needed more assistance than others, and the regional managers had to spend greater amounts of time in those schools that required their direct support. As a result, as the program grew, it became challenging to stay in close touch with all of the schools.

In Boston, in contrast, regional managers were able to visit each of their schools once or twice a month. This appears to be a consequence of the site's using AmeriCorps members rather than paid staff as school coordinators, a cost-saving measure that enabled them to hire enough staff for training, database management and other key functions so that the regional managers could focus the bulk of their time on supervision.

New leadership and inadequate staffing levels sometimes compromised the effectiveness of sites' infrastructures.

Sites led by experienced directors were, in general, better able to anticipate and respond to challenges that could impede their progress and affect the quality of their services. And without adequate staffing levels, even the best-designed quality-control measures could not be carried out consistently. The problems experienced by Washington and Philadelphia could be attributed at least in part to new leadership, staffing shortages or both.

As we have noted throughout this report, Washington began expansion with a new tutoring curriculum and service delivery strategy and with new responsibilities for training and supervising the volunteers. It was difficult for the program director, who was hired just before expansion began and had limited experience in program management, to address all of the challenges simultaneously. As the only full-time staff member throughout the first year of expansion, she did not have the help or expertise she needed to forge cohesion among her part-time field staff, who were either new to the program or new to their role, or train them on the use of the new curriculum. As a result, there was a lack of consistency in the implementation of the program from school to school and turnover was high among school coordinators and regional managers.

Philadelphia did have an experienced director. The site's difficulties arose from not adding field staff at a rate that kept pace with its rapid growth in the third year of expansion, when it went from 18 to 36 schools. The site was not able to fill three of its nine school coordinator positions. As a result, the regional managers, each of whom was responsible for 12 schools, had to oversee a number of these schools without assistance from a school coordinator, and they struggled to attend to all of their schools adequately. Instead, they had to rely on the volunteer team leaders to take on additional oversight responsibilities in the more stable schools so they could spend their time in schools that needed intensive supervision. (They were also aided by the fact that teams of veteran volunteers in the site's longstanding Experience Corps schools needed only minimal supervision.)

Still, the shortage of staff left gaps in coverage and also took its toll on the regional managers. By the end of the year, two of the three left the program. Although they were young professionals who undoubtedly had many reasons for moving on, our interviews suggest that the strain of their workloads may have been a factor in their decision to leave.

Promoting from within helped build staff capacity and stability.

One practice for identifying and hiring staff who had experience with the program—an approach used primarily by New York and Boston—was to promote school coordinators, often to oversee the very positions they had held the previous year. In Boston, the practice was widely used. AmeriCorps school coordinators who came back for a second year were promoted and given responsibility for overseeing two to four first-year school coordinators. In addition, two of Boston's regional managers

had started out as AmeriCorps school coordinators and worked their way up to this senior staff position.[30] This practice gave young staff and National Service members the opportunity of career advancement and enabled the program to reap benefits from the investment it made in training and nurturing junior staff. It also added credibility to supervisors who had "been there" before.

How Did School Coordinators Monitor the Quality of the Volunteers' Services? What Quality-Control Issues Remain Unresolved?

On the whole, the sites were able to build an infrastructure that allowed them to continue to provide the same level of program oversight as the number of school sites increased. However, systems for monitoring the quality and consistency of the volunteers' tutoring were not always flexible enough to adapt to the growth of and change in the programs, and certain quality-control issues that existed prior to expansion were still unresolved by the end of the initiative.

Structured tutoring programs that included on-site monitoring lent themselves to far greater quality control than other pull-out tutoring approaches.

Commercial tutoring programs, such as Book Buddies or Reading Coaches, use graduated reading books, explicate a step-by-step process for each component of a lesson (e.g., previewing vocabulary, decoding unfamiliar words, guided reading and comprehension checks) and include a standardized format for daily lesson plans and progress reports. In addition, each of these tutoring programs requires a trained school coordinator to stay in the room with the tutors to provide guidance in using the materials effectively. Thus, quality-control mechanisms were built into the structure of the programs. In our limited observations of volunteers using these materials, we noted a good deal of consistency in the quality of the tutoring sessions, even given differences in the skill and style of the individual volunteers.

It was more difficult to monitor quality and provide immediate guidance to the volunteers when they worked with students in pull-out tutoring programs that did not use a structured curriculum. In Cleveland and Philadelphia (which used a pull-out model until the second year of implementation), the content of the tutoring session was determined by the teacher, who sent the child to the session with a specific assignment to complete, or by the tutor. In Cleveland, for example, volunteers sometimes used the teacher's assessment of the student's needs as a guide for choosing an appropriate activity from a resource book compiled by the site. Furthermore, unlike school coordinators for Book Buddies and Reading Coaches, school coordinators in Cleveland and Philadelphia did not stay with the tutors throughout the day. Consequently, neither the teacher nor the coordinator was present to monitor the appropriateness of the chosen activity or the quality of its execution. Although our observation of volunteers was limited, we noted considerable variation in the quality of the tutoring sessions among those we did observe.

It was also difficult to monitor the quality and consistency of the program when volunteers worked inside the classroom.

One-to-one tutoring sessions took place in a room dedicated by the school for Experience Corps services or in a public space in the school, such as a hallway. Thus, it was relatively easy for the coordinators to observe the tutors working with students. But because changes in school-day schedules and curricula were making it more difficult to remove students from their classrooms, Experience Corps volunteers were spending more time working inside the classroom.

Sites were still experimenting with ways to effectively monitor volunteers in these settings. The school coordinators had limited opportunities to directly observe these volunteers, mainly because of concern that the teacher would consider it an intrusion if the coordinator remained in the classroom for an extended period of time. Therefore, most coordinators reported that they would sit in the classroom only occasionally and for just a few minutes, or would look in through the window on the door to see what the volunteer was doing. To keep abreast of the volunteers' activities in the classrooms, they relied instead on indirect means, such as brief conversations with the teachers, logs of daily activities that the volunteers were asked to keep (but did not always do consistently or in detail) and discussions with the volunteers at the monthly team meetings. However, these methods were of limited use in monitoring the volunteers' activities in the

classroom or providing feedback on their behavior-management or tutoring skills. The result was that the classroom teacher essentially became the volunteer's supervisor, and the program had less control over the content or quality of the volunteer's services.

Experience Corps' desire to implement a high-quality tutoring program sometimes competed with its commitment to providing a fulfilling experience to older adults.

Experience Corps was designed to benefit two populations: struggling young readers and the older adults who volunteer to help them. Over the course of the initiative, we noted a marked increase in the emphasis given by both the national office and the individual sites to the need for Experience Corps to demonstrate measurable gains in students' reading scores in order to convince local schools of the value of the program and secure ongoing and sustainable funding. At the same time, however, site staff conveyed some ambivalence about creating more formal systems for assessing the volunteers' tutoring skills and the quality of their interactions with the students. This ambivalence may have stemmed from the fact that Experience Corps is as much a program geared to enhancing the well-being of the volunteers as it is to promoting children's literacy skills. Formally assessing the volunteers' skills may feel at odds with this philosophy.

A related issue is the need for a policy on how to identify and deal with volunteers who begin to show signs of physical or mental decline. Understandably, this is an extremely difficult issue for a program founded on the conviction that older adults are an untapped resource. When asked how they dealt with a volunteer showing diminished capabilities, individual staff readily described their personal strategies, such as watching the volunteer over time to confirm their suspicions (to make sure the volunteer was not just having a bad week) or accommodating the tutor's diminished stamina by reducing the number of children or hours she or he tutored. However, not all sites gave specific training to their field staff about what to look for and how to handle it, nor does the national office have a set of policies and procedures that field staff could follow. Given the number of volunteers in their mid-70s and older, having such a policy seems important.

Despite these unresolved challenges, the five sites were quite successful in achieving the goals of the expansion initiative. As the previous three chapters have demonstrated, in each year of the initiative they expanded to more schools, engaged increasing numbers of older adults and served more children. And they largely succeeded in putting in place structures and practices to manage their growth. The next chapter examines the progress the sites made in raising the funds necessary to support and sustain their expanded programs.

Funding and Sustaining the Expansion

Chapter VI

Experience Corps began as a demonstration project of the Corporation for National and Community Service (CNCS). Since the founding of the program, Experience Corps sites have relied largely on pass-through grants to Civic Ventures from CNCS for the bulk of their funding. The sites did have to raise part of their budgets themselves and did so primarily with small foundation grants and, to a lesser degree, through fundraising events and donations from individuals. When the sites were small, the burden of raising these matching funds was relatively light.

In 2001, Civic Ventures was awarded $3,300,000 from the Robert Wood Johnson Foundation (RWJF) and $2,000,000 from The Atlantic Philanthropies (AP) to expand the program in five sites. Over the course of the expansion, the lead site, Philadelphia, would receive $2,200,000; the two scale sites, New York and Boston, would receive $1,100,000 and $1,050,000 respectively; and the two growth sites, Cleveland and Washington, would receive $500,000 each. The sites could determine how much of this money they drew down from these grants each year and could carry over unused funds from the year before. In addition, four of the expansion sites were receiving CNCS AmeriCorps funds via a pass-through grant awarded to Civic Ventures. (Boston applied for AmeriCorps funds on its own, through the Massachusetts Service Alliance, the state's service commission.)

While the expansion grants and AmeriCorps funding were substantial, they did not cover the sites' entire budgets, and the sites had to raise the rest themselves.[31] With expansion, of course, the amount of funds they had to raise increased to well beyond what they had needed to generate in previous years.

The sites' immediate task was to raise sufficient funds to meet their projected annual operating costs, including staff salaries and volunteer stipends. Their long-term goal was quite daunting: to at least maintain the size of their program once the expansion grants ended, and to move toward further growth and long-term financial stability by accessing city, state and federal funding. In particular, Civic Ventures hoped that the local school districts would ultimately be a source of renewable funds for the sites. To meet their immediate funding needs and position themselves for future growth and stability, the sites would have to expand and diversify their funding base beyond a traditional reliance on foundation grants (and federal AmeriCorps funds) and search out possibilities for long-term sustainability. The challenge for the three larger sites (Philadelphia, New York and Boston) was especially daunting because their greater size meant that they had to raise more money.

This chapter describes how the expansion sites addressed their immediate and longer-term funding needs and examines the following questions:

- How successful were the sites in raising matching funds?
- To what extent were the sites able to diversify their funding base?
- What organizational resources contributed to successful fundraising?
- What challenges do the sites face in sustaining their growth?

As Chapter II described, the sites started expansion with different degrees of financial stability. However, this chapter shows that their starting points did not necessarily predict their ultimate success.

How Successful Were the Sites in Raising Matching Funds?

Raising sufficient funds to meet their increasingly large annual budgets meant that the sites had to launch an aggressive and sustained fundraising campaign. To build a more stable funding base, they needed to continue to go after grants from local foundations as they had in the past but also diversify their funding sources to include individual, corporate and public funds. To move toward their goal of getting sustainable public funding, they also needed to develop relationships with elected officials at the federal, state and local levels, and to strengthen relationships with school district leadership.

Table 7
Expansion Sites' Income Over Four Years, 2002 to 2006[a]

	Total income: all sources	Pass-through grants from national office[b]	Amount raised by the local site	
Philadelphia	$5,140,440	$4,268,340	$872,100	17%
New York	$5,241,853	$2,095,964	$3,145,889	60%
Boston	$4,070,291	$1,050,000	$3,020,291[c]	74%
Cleveland	$1,509,651	$892,816	$616,835	41%
Washington, DC	$1,738,333	$887,207	$851,126	49%

Source: Experience Corps national office

[a] These figures do not include in-kind contributions.

[b] Pass-through grants from the national office include grants from the Robert Wood Johnson Foundation, the Atlantic Philanthropies and the federal Administration on Aging, which all sites received, and federal AmeriCorps funds that all sites but Boston received.

[c] The total amount raised locally by Boston includes $1,003,036 in AmeriCorps funds the site received through a grant from the Massachusetts Service Alliance, the state's service commission.

As part of its function to advocate for and support all of the local Experience Corps sites, the national office helped the expansion sites' fundraising efforts in a variety of ways. Because programs that attract media attention are more likely to attract the attention of funders, the national office's communications director continuously sought out opportunities for local and national coverage of the program through both print and broadcast media. The office also provided the expansion sites with technical assistance on specific development strategies, helped sites with proposal writing and advocated for the program with local funders. To further attract local funders, it helped the sites develop a "Points of Entry" campaign,[32] which brought small groups of community leaders, elected officials and potential donors to visit a local program in action so they could see and understand Experience Corps firsthand. The national office also emphasized how important it was for the sites to develop relationships with their representatives in Congress and prepared packets of information and "talking points" about Experience Corps that sites could use if they were able to meet with their representative.

During the four years of the expansion initiative, the sites raised an impressive amount of money, although they differed in the proportion of their budgets they raised themselves.

Given the sites' limited experience raising large sums of money in the past, their fundraising efforts over the course of expansion were, for the most part, quite successful. As Table 7 shows, the amounts they raised over the four years ranged from approximately $600,000 to slightly more than $3,000,000.

The table also indicates that there were considerable differences not just in the amount each site raised but also in the proportion of their budgets covered by local fundraising, which ranged from 17 percent in Philadelphia to 74 percent in Boston. Although Washington reported initial difficulties securing the funds needed to hire key staff, by the end of the four years it had locally raised almost half of its total funding. Philadelphia relied heavily on pass-through grants from the national office for funding: The 17 percent that the site raised locally came almost exclusively from the fees it charged the schools. The table also reflects the fact that although Philadelphia was the largest program in terms of the number of volunteers and schools, it operated on a slightly smaller budget than that of New York—at least in part because it had a relatively small staff.

To What Extent Were the Sites Able to Diversify Their Funding Sources?

While the sites were able to raise relatively large amounts of money, diversifying their funding sources proved to be challenging. However, as Table 8 shows, most sites did ultimately generate funding from a variety of private and public sources.

For most sites, foundation money was the mainstay of funding throughout expansion.

Applying for grants from private foundations was a major fundraising strategy throughout the expansion initiative in all sites except Philadelphia; and as a group, the sites raised 37 percent of their matching funds from private foundations,[33] sums that ranged from almost $1 million in New York and Boston to almost $500,000 in Cleveland.

The amount of money raised in this way is even more impressive when one considers that the majority of these grants were small—between $5,000 and $20,000—and were typically limited to a single year. Relying on these grants as a primary source of income was a time-consuming process that required sites to write a number of proposals each year and constantly identify foundations that they had not yet approached. Staff in Boston, Cleveland and New York reported that having the RWJF and AP grants helped them leverage funding from other foundations in some cases, but it could also present a barrier to funders who preferred to give their money to programs that, in the funders' view, needed the money more.

Newly launched individual donor and major gifts campaigns produced mixed results.

In the past, the sites had received some donations from individuals, and during expansion, the national office encouraged them to intensify their efforts through individual donor and major gifts campaigns, and provided the sites with information about specific strategies, such as the Points of Entry visits mentioned earlier in this chapter. Three sites—Cleveland, Boston and Washington—took up the challenge. (Immediately before the expansion initiative began, CSS in New York received a $1 million donation from an RSVP trustee, which was used to support Experience Corps's expansion. Subsequently, the site did not launch an individual donor and major gifts campaign but focused its efforts on other fundraising strategies.)

Table 8
Sources of Locally Raised Funds

Funding Source	Philadelphia		New York		Boston		Cleveland		Washington, DC		Total	
Corporate	$9,500	1%	$178,300	6%	$309,000	10%	$43,000	7%	$6,000	1%	**$545,800**	**6%**
Foundation	$5,000	2%	$990,000	31%	$951,839	32%	$490,225	79%	$679,000	80%	**$3,116,064**	**37%**
Individual	0		$1,012,575	32%	$357,109	12%	$6,110	1%	$14,200	2%	**$1,389,994**	**16%**
Public *Federal*	0		$627,514	20%	$212,409	7%	0		$133,000	16%	**$972,923**	**11%**
Public *State*	$54,000	6%	$87,500	3%	$1,003,036	33%	$72,000	12%	n/a		**$1,216,536**	**14%**
Public *Local*	$783,600	90%	$250,000	8%	$186,899	6%	0		$18,926	2%	**$1,239,425**	**15%**
Other	$20,000	.3%	0		0		$5,500	1%	0		**$25,500**	**.2%**
Total	**$872,100**		**$3,145,889**		**$3,020,291**		**$616,835**		**$851,126**		**$8,506,241**	

Source: Experience Corps national office

Many of the three sites' efforts to raise funds from individuals centered around large-scale mail or phone solicitations and fundraising events. For example, Cleveland sent letters to a large database of current RSVP and Experience Corps volunteers, and Boston sent out letters to 2,000 individuals on its mailing list. With help from its board, Boston also hosted small gatherings of potential donors who might make more substantial gifts to the program, and organized Points of Entry visits so potential donors could observe the program in action at a local school.

These efforts produced mixed results. Cleveland raised a little over $6,000. In the fourth year of the expansion initiative, Washington hired a part-time development staff person who managed to increase the amount raised from individuals from roughly $2,000 in 2005 to more than $10,000 in 2006. Through its mailings, fundraising events, hosted parties and donations from board members, Boston's campaign was the most successful. The site raised $60,000 or more from individuals during each year of the expansion initiative, for a total of almost $360,000 (12 percent of its total matching funds).

Local conditions and a lack of experience limited sites' abilities to raise money from corporations.
All of the sites talked about wanting to raise money from corporations, but most struggled to find the best way to identify and approach them. As Table 8 indicates, as a group the sites raised only 6 percent of their matching funds from corporate sources—either through corporate foundations or corporate sponsorships. In terms of the amount of funds raised, New York and Boston were relatively successful. New York raised almost $180,000 and Boston raised slightly over $300,000, but these amounts represented just 6 percent and 10 percent of their total matching funds. Washington and Cleveland may have been further hampered by local conditions, such as a dearth of corporate headquarters in Washington.

Long-standing relationships with elected officials helped some sites win federal and state earmarked funds.
Even before the expansion initiative, Experience Corps staff tried to cultivate relationships with elected officials at all levels to try to raise support and funding for their programs. For the most part, the funds they received came in the form of federal or state earmarks, or money set aside in state and federal budgets for legislators to award to constituents in their districts. With the exception of New York, which had received $250,000 in federal earmarked funds in the late 1990s, the awards had typically been less than $50,000 a year. While the size of those grants was relatively small, these relationships were important, and the sites, including New York, made efforts to continue to expand them throughout the four years of the initiative.

In Philadelphia and New York, continuing to advocate for Experience Corps to their local representatives paid off. At the end of the third year of the expansion initiative, New York won a second grant of $400,000 in federal earmarked funds from two congressmen, each of whom represented a district in which the site had programs. In the final year of expansion, Philadelphia was granted $500,000[34] by the chairperson of the Pennsylvania State House of Representatives' Appropriations Committee, a long-standing champion of Experience Corps (and a representative from a district in Philadelphia) who had secured state funds for the program in the past, although in far smaller amounts. The program was now in more than 40 Philadelphia schools and garnering increasing media attention, and its growing significance, coupled with the efforts of Philadelphia's program director to raise local officials' awareness of it, contributed to the site's being awarded such a large amount of earmarked state funds.

Without the strategic planning of CSS or the size of the Philadelphia program, however, it was difficult for the other sites to gain access to their local power brokers. And although sums could be large, earmarked funds were not a reliable source of funding as they depended on elected officials who had many competing priorities and constituents to consider.

Aside from earmarked funds, some sites were able to tap into state and federal funding streams.
Despite the scarcity of public funding streams to which the sites could apply, Boston, Washington and Cleveland did meet with some success. Washington and Boston each won a competitive three-year Federal Mentoring Grant for $350,000 and $600,000 respectively.[35] Cleveland continued to partner with individual schools for Ohio Reads state funds and received a total of $72,000 over the four years of expansion through these partnerships.

One tempting source of income was the federal Supplementary Educational Services (SES) funds that were made available for tutoring children in underperforming schools as part of the No Child Left Behind Act and which could potentially be an ongoing source of revenue for the sites. On the surface, Experience Corps seemed like a natural fit for these funds, but the requirement that tutoring services be offered only outside of the regular school day (i.e., before or after school) made SES inappropriate to the program's school-day model. The funds were also very difficult to secure as they required programs to win approval from the state as an SES provider. Nonetheless, Boston (which ran Experience Corps in four community-based after-school programs) applied for and won approval as an SES provider during the third year of the expansion initiative. By the end of the initiative, the site was developing an SES services component for its program.

It proved much harder than anticipated to develop contacts within the school districts' central leadership that might lead to stable funding from the schools.
In Civic Ventures' vision, local Experience Corps sites would receive at least part of their local funding from school districts. In order to tap into sustainable funding from the local school districts, the sites needed to get the attention of the districts' central leadership. Although all five expansion sites tried to develop relationships with the office of the school district's CEO or superintendent, only one was successful.

As discussed in Chapter III, turnover in district leadership, district restructuring and the resulting staff changes disrupted or ended programs' existing relationships with mid-level administrators and made it more difficult to gain access to district leadership. Despite their growth and increased media attention, most of the local Experience Corps programs were not yet well known within their cities, and they often competed with other, better-known tutoring programs for attention from their districts. Letters sent to school district CEOs from the national office and even face-to-face meetings between the head of the national office and school district leaders did little to advance Experience Corps's agenda within the districts.

Sites went to great lengths to meet with school district superintendents or CEOs but made little headway. Boston's frequent phone calls to the superintendent went unanswered, although it was able to meet with the deputy superintendent. Cleveland won a meeting with the school district's CEO as the highest bidder in a local charity fundraising auction where an hour of the CEO's time was being auctioned. (The bidder was an RSVP employer who paid for this with her own money.)

Within the Experience Corps network, Philadelphia was the only site that succeeded in receiving fees from individual schools for its services.[36] While this was a significant achievement, the money came from principals' discretionary funds rather than the school district. Contracts were negotiated with individual schools and had to be renewed annually—a very time-consuming process. Further, funding was vulnerable to changes in school leadership, priorities and budgets. Thus, to tap into more stable funding from the school district, the Philadelphia site, too, was trying to build a relationship with the school district's central leader.

Philadelphia's program director had been unable to get further than the superintendent's chief of staff. Finally, at the end of the third year of the initiative, he succeeded in arranging a face-to-face meeting when he invited the superintendent to an event at one of the Experience Corps schools that was going to get a lot of attention in the local press. However, as was the case in Cleveland, the meeting did not lead to new funding opportunities for the program.

By the end of the initiative, New York was the only site that had succeeded in getting financial support from the city's mayor and school district leadership. Taking Experience Corps citywide with the help of financial support from the city had been a longtime goal of CSS. At the end of the third year of the expansion initiative, when the program was in schools in Manhattan, Brooklyn and the Bronx, CSS convinced the Mayor's Office and the Chancellor of the New York City public schools to support the expansion of the program to Queens, and the site was awarded a grant from the city's Department of Education for $250,000. (The grant was subsequently renewed for $400,000 in 2006–07, the year following the end of the expansion initiative.)

What Organizational Resources Contributed to Successful Fundraising?

As the previous discussion suggests, there was a great deal of variation among the five sites in terms of the amount and proportion of matching funds they raised and in the sources of funding that each site was able to access. The factors that contributed to this variation were:

Buy-in and support from host agency leadership could play a crucial role in fundraising.
This was the case in New York and Cleveland, sites that raised 60 and 41 percent of their own funds. In both sites, host agencies were highly committed to Experience Corps' growth and sustainability, and devoted staff time and resources to raising funds for the program. For example, in Cleveland, the executive director and development director of RSVP spearheaded the program's development work. While the Experience Corps director focused on overseeing daily program operations and building relationships with the schools, RSVP's executive director continued to cultivate relationships with the major foundations in the city. In addition, it was through her efforts that the site established partnerships with individual schools for state Ohio Reads literacy funds. Even beyond that support, RSVP's development coordinator dedicated 40 percent of her time to fundraising for Experience Corps and was an important asset in the program's effort to meet its annual fundraising targets.

In New York, CSS' development department sought out local foundations that the program had not approached previously, and in one year alone succeeded in winning small grants from nine new foundations. The head of CSS also actively advocated for Experience Corps and was key to the site's gaining both federal and city funds.

Board members also could play an important role in sites' fundraising efforts.
While strong host agencies were important in helping to access private foundation and public funding, organizations' board members were also a key asset in two of the sites. Boston's board members were particularly active in raising funds from individual donors—identifying potential donors, hosting fundraising gatherings at their homes and participating in the Points of Entry visits, in which groups of potential donors visited an Experience Corps school. Even beyond these efforts, the board members themselves contributed more than $100,000 to Experience Corps during the expansion initiative. Members of CSS's board played a similar role in New York. They hosted gatherings in their homes to drum up support for Experience Corps among local funders and elected officials, and they participated in some Points of Entry visits.

Strong leadership was key to Boston's success.
As Boston's efforts illustrate, successful fundraising could occur even without the resources of a strong, well-connected lead agency. Boston not only dug itself out of debt but managed to raise more than $3 million and a higher proportion of its budget than any other site. Boston's success resulted from the strong leadership of the Generations Incorporated executive director, who was a good strategic thinker and made effective use of all available resources. For example, soon after she was hired, she started building up her board of directors, appointing people to it who she felt could help her raise money. And when faced with decisions about staffing priorities, she hired a full-time development staffer and temporarily closed a key field staff position. With the help of a small development staff (which, in addition to the full-time staff member, ultimately included two assistants) and the new board, the site made full use of the Points of Entry program visits and launched a sustained fundraising effort that succeeded in winning grants from private foundations and also tapped funding from individual donors, corporate foundations and federal funding streams.

Raising money to cover annual expenses during the four years of expansion was essential to the sites' ability to meet their expansion goals. But to sustain the growth they had achieved by the end of the initiative, the sites needed to secure funds to replace the RWJF and AP expansion grants that had covered roughly between 20 and 40 percent of their budgets, an issue discussed below.

What Are the Sites' Challenges to Sustaining Growth Over the Short and Long Term?

While the programs increased their capacity to raise local funds, creating a diverse and stable funding base that will allow them to maintain their staffing

levels and build on and consolidate the lessons learned from the expansion initiative remains a significant challenge. All five sites plan to continue operating at their expanded size for at least the immediate future. The current federal AmeriCorps grant continues through August 2008. In addition, Civic Ventures received a two-year continuation grant from Atlantic Philanthropies, which gives the local sites and the national office partial support through 2009 and allows some additional time to secure new sources of sustainable funds.[37]

The long-term picture is less clear. Three sites (Boston, New York and Cleveland) have expressed concern that they have all but exhausted what they can hope to raise from local foundations, having tapped most of them already. At the same time, all of the sites believe that as individual, local programs, they would not be able to interest larger, nationally focused foundations, and they look to Civic Ventures to raise the kind of multiyear, multisite foundation money they were able to secure for the expansion initiative. While the national office views seeking such funds for the local programs as part of its mission, it faces a barrier that is common to social programs at this stage of their development: Large, nationally focused foundations often prefer to fund newer initiatives rather than mature programs.

The issue will become more critical if AmeriCorps funding is reduced or eliminated. With the exception of Boston, the sites use those funds for stipends for their full-time volunteers. A reduction in those funds would necessitate their raising additional money to pay for volunteer stipends, reducing the number of full-time volunteers or both. Reducing the size of the stipends or completing eliminating them do not seem to be viable options, as this would likely result in far fewer volunteers willing or able to commit to serving the number of hours each week that has been the hallmark of the program and the key to its ability to provide intensive service in the schools. Boston uses its AmeriCorps funding primarily to support the National Service members who serve as school coordinators and would thus face different but significant challenges if those funds were reduced or eliminated.

Philadelphia may be in the most vulnerable, especially given the challenges it has encountered in working through the university's development office. The site raised less than 20 percent of its overall budget during the four years of expansion, and almost all of that income came from a single source—fees from individual schools. While the $500,000 in earmarked state funds has enabled Philadelphia to cover expenses in the year following the end of the expansion initiative, it is unlikely that this source of funding will be sustained at that level. Nonetheless, with programs in more than 40 Philadelphia public schools and a strong supporter in state government, the site may be well-positioned to gain access to the city's newly elected mayor and new school district CEO, and that could lead to more stable public funding.

With its relationships to influential leaders at the city, state and federal levels and its successful record of raising both foundation money and public funds, New York may be in the best situation for sustaining its growth. Having won commitments from the Mayor's Office and the city's Department of Education to fund further expansion and provide continued support of the existing program, and with a well-connected host agency willing to dedicate its considerable resources, New York is well-positioned to raise funds to support a citywide expansion.

Experience Corps' long-range goal is for the local sites to receive sustainable funding from their respective school districts. In order to do this, the program will have to continue to modify and innovate and stay relevant to the schools. As Chapter III demonstrated, the sites were able to accomplish this during the turbulence of the last four years. The challenge is to get the central leadership of school districts to see Experience Corps as an essential part of the district's programming and worthy of ongoing support. One of the lessons that emerges from their efforts thus far is how difficult it is to accomplish this.

This report has focused on the experiences of the five sites as they progressed through what one researcher has called the "roller-coaster ride" of sustained expansion.[38] In the concluding chapter, we review the sites' key accomplishments and remaining challenges, and draw together the lessons gained from their experience that can inform other expansion efforts.

Conclusions

Chapter VII

The five Experience Corps sites began the expansion initiative as a group of small but generally well-established programs. Their staffs were small enough to function effectively with a minimum of formalized communication and operating procedures. Although, as a group, they shared a set of core principles that defined each of their programs, they were known more by their local program names—for example "Book Buddies"—than as "Experience Corp" sites. The four-year expansion initiative, made possible by grants from the Robert Wood Johnson Foundation and The Atlantic Philanthropies, gave Experience Corps an opportunity to extend its reach within each of the five participating cities. The initiative also enabled the program to achieve its goal of gaining recognition as a nationwide network with a shared identity, whose local Experience Corps sites operated under a common logo. Local sites were affiliated with a national office that offered advocacy, management, training, communications and development functions for every site and the program as a whole.

This report has documented the achievements and challenges of the five local sites that participated in the expansion initiative. Their experience generated lessons that are important not only to Experience Corps' future expansion efforts but also to other programs considering a formal expansion initiative. After briefly recapping the achievements of the sites, we conclude with a discussion of the lessons that have broader relevance.

Overall, the Experience Corps sites showed great flexibility and creativity in adapting to the challenges brought by expansion. Their most significant achievements include the following:

The sites met, or nearly met, their goals for school expansion.

Despite major school reform efforts, budget cuts and leadership changes in local school districts that could have impeded their growth, sites went from operating Experience Corps programs in 4 to 12 schools at the start of expansion to having programs in 9 to 43 schools by the end. The sites' good relationships with the schools and their flexibility in adapting to changes in school schedules, personnel and priorities helped them meet this challenge.

By Year Four, most of the sites had many times more volunteers serving in the program than they had at baseline.

Volunteer enrollment ranged from roughly 40 to a little over 100 right before expansion; this grew to between 160 and almost 550 by the end of the expansion initiative. Moreover, the sites succeeded in attracting many individuals who had not been involved in sustained volunteer activity in the past. The effort required that sites move from seasonal recruitment to more intensive and sustained year-round recruitment. Support from a well-connected host agency was extremely helpful to sites' recruitment efforts.

Stipends continued to be an important incentive for attracting individuals willing to serve 15 hours a week. One site's experiment—offering reduced stipends to individuals who wanted to serve fewer hours—suggests a strategy that could succeed in attracting part-time volunteers who are otherwise difficult to engage.

Increasing the number of field staff and adding layers of supervision helped the sites maintain the level of oversight and support to schools and volunteers that they had before they expanded.

These management structures worked best where supervisors did not have responsibilities for other aspects of the program that limited their time to observe the schools directly. Further, in some cases, new program leadership and inadequate staffing levels compromised the effectiveness of the site's supervision infrastructure. Finally, promoting from within the organization helped build staff capacity and stability. Structured tutoring programs that included on-site monitoring lent themselves to far greater quality control than other pull-out tutoring approaches. Because opportunities for program staff to observe classrooms were limited, it was much more difficult for staff to monitor the quality of the program when volunteers worked inside the classroom.

Most sites greatly improved their capacity to raise local funds; however, creating a diverse and stable funding base that will allow them to sustain their growth has proven more difficult.

Over the four years of the initiative, the sites raised an impressive amount of money, although they differed in the proportion of their budgets they raised themselves—ranging from 17 percent to 74 percent. In general, the sites were most successful in generating support from local foundations. Longstanding relationships with elected officials helped two sites win substantial federal or state earmarked funds, and three sites won federal or state grants. Efforts to raise money from individual donations or corporate grants or sponsors was more difficult. Further, it proved much harder than anticipated for sites to develop contacts within the school districts' central leadership that might lead to stable funding from the schools.

When asked to reflect on their experiences over the past four years, Experience Corps program directors and host agency staff said they all felt that their sites definitely benefited from expansion. One program director said, "[Expansion] has forced us to be much more thoughtful and strategic, to step up the quality of programming and to become much more well known." As her comments suggest, there was a sense among the directors that the greater visibility that came with getting bigger and being part of a national initiative heightened expectations for the quality of their programs (among potential funders and schools, for example) and forced them to continually strive to improve. Three directors commented that growth also brought them greater respect from the school community. As one noted, "The bigger we get, the better we can make the case that our program is something that can be replicated easily and is successful in different communities throughout the city. By getting bigger and maintaining quality, we've proven that this isn't just a start-up program but can really take off and achieve results."

Some major challenges remain. The program is still searching for more rigorous ways to monitor and support in-class volunteers and for systematically assessing volunteers' tutoring and informal mentoring skills. In addition, both locally and nationally, Experience Corps will need to come up with strategies for long-term sustainability.

What Lessons Learned From the Sites' Experiences Can Inform Other Expansion Efforts?

The experiences of the five sites have generated important information about the conditions that can lead to successful expansion:

Programs need to be flexible enough to respond to the demands of the external environment while staying true to their core principles—and this can be a difficult balance to maintain.

It is unlikely that an expansion initiative will unfold within a static external environment, and programs will always need to adapt to changes in their local communities. Program models like Experience Corps that are organized around a set of core principles that guide but do not dictate specific program strategies have flexibility to adapt to changing conditions. In Boston and Philadelphia, access to students for pull-out tutoring—which had been the core program service in both sites—became more limited, but the sites were able to move more volunteers inside the classroom and, in Boston's case, develop an additional alternative service option (i.e., Lunchtime Mentoring) that did not require children to leave their classrooms. In neither site did these changes conflict with Experience Corps' principles or focus (e.g., teams of well-trained volunteers helping young children develop literacy skills). Further, the changes each site made to its program were built upon prior experience—a small proportion of Philadelphia volunteers had always served inside the classrooms—or were introduced incrementally, after careful piloting, as was the case with Boston's in-class and lunchtime components.

A well-established, well-connected host agency, whose leadership fully supports the expansion effort, can provide critical resources to programs attempting significant growth.

Small to midsize programs like Experience Corps rarely have the capacity to leverage the resources needed for a major expansion effort unless they are part of a larger organization. Experience Corps sites benefited enormously when they were imbedded in a well-established host agency that considered Experience Corps and its expansion an integral part of the agency's own mission. Being housed in such a host agency gave the Experience Corps sites access to resources, expertise and connections that they would not otherwise have had. In addition to

providing office space and equipment, supportive host agencies provided administrative support, staff time and expertise for fundraising and development, and help with strategic planning from experienced administrators. Host agency connections in the community gave the sites access to potential volunteers, and their local reputation lent the program credibility with potential funders and schools. In New York, the host agency's connections to elected officials resulted in the site winning several hundred thousand dollars in city and federal funds. Of the three sites that were not housed within host agencies that supported Experience Corps' expansion and had the resources to dedicate to it, only Boston was able to achieve success in all aspects of expansion, and that was due, in large measure, to the strong leadership of its executive director.

Obtaining renewable funding to sustain growth is a major challenge.

One of the most daunting challenges programs face after a major expansion effort is raising sufficient funds to sustain their new size. The five sites, which received between 20 and 40 percent of their overall funding from two foundations during the expansion period, must find ways to replace these funds.[39] Efforts to develop a diversified funding base that included money from individuals, corporations and local, state and federal government were not as successful as anticipated. Program directors feared that their programs were still too small to secure a major grant from a nationally focused foundation unless they applied as a group through the national office. Yet, it will be difficult for Civic Ventures to secure large pass-through foundation grants, as most major foundations prefer to fund new initiatives. In the meantime, the program may have to rely on small foundation grants and other short-term funding to sustain itself.

Experience Corps' long-term goal of securing renewable funds from city public school systems may not be feasible in an era in which the school districts themselves are in chronic financial distress. Despite the sites' solid reputations with individual principals and, in some cases, their increased coverage by the local media, only one of the five sites succeeded in forging a relationship with city leaders that led to a grant from the city's Department of Education—and it is not certain whether, and at what level, these funds will be sustained. Stable funding from state and federal governments remains a long-term goal.

The fee-for-service model of sustainability has both advantages and disadvantages.

Philadelphia received approximately a fifth of its annual budget from fees it charged the schools. This strategy provided the site with a reliable and sustained source of income and arguably resulted in greater buy-in from and attention paid to the program by the principal, who had used very limited resources to bring the program to the school. But this funding strategy brought disadvantages as well. The willingness or ability of a school to pay for the service was a factor that guided school selection and determined school attrition at least as much as the site's own strategic plans. Because Philadelphia relied on school fees for a substantial part of its budget, it was under greater pressure to accommodate the requests and priorities of individual schools. While all sites had to stay relevant to the schools to survive, bringing a no-cost, high-quality service to the schools may have provided Boston with more freedom to innovate and helped New York continue to offer its research-based Book Buddies program.

The Experience Corps expansion effort also provides three valuable lessons for funders, policymakers and other planners on how such initiatives might be structured in the future:

Adopt a rigorous process for determining a program's readiness to expand. Such an effort should include assessments of a program's stability over time, relationships with key agency partners, financial strength and leadership.

The demands of expansion are difficult to anticipate and, in some ways, programs can never be fully prepared. However, the findings from the Experience Corps expansion effort are consistent with those from similar efforts regarding the need for programs to have a proven track record before they attempt to expand. The fact that the sites had built a good reputation in the schools was a key factor in enabling them to expand during a time of school reform and budget cutbacks. Internal readiness also proved important. The Washington, DC, site's progress during the initiative was seriously hampered because its energies were consumed by the need to

consolidate the recent changes it had made to its organization and operations at the same time that it was trying to expand. In contrast, the Cleveland and New York sites were able to adopt a proactive approach to the challenges of expansion because they started with experienced leadership, a tested program and service delivery model, and no serious financial problems.

Establish modest goals and build in time to assess progress and make midcourse corrections as needed.
Staff from the local sites and the national office agreed that the goals for both volunteer enrollment and school expansion were too ambitious, not only because of the challenges involved in attracting more volunteers and adding more schools, but because these had an impact on every other aspect of the program. Bringing in more volunteers required changing procedures and adding staff time for intake, database management and stipend distribution; training larger numbers of volunteers created scheduling and logistical challenges; and managing larger numbers of schools and volunteers required increasing the size of the staff and reconfiguring supervisory structures. Addressing these simultaneous demands was exhausting. All sites agreed that it would have been extremely valuable to have an interval of time to consolidate what they were learning, identify strengths and weaknesses, and make midcourse corrections without the pressure to grow.

Avoid requirements that force sites to make fundamental changes to their program model to meet expansion goals.
The requirement that the expansion sites recruit equal numbers of full- and part-time volunteers created additional complications for all of the sites and particular difficulties for the two sites that had little or no prior experience using part-time volunteers. To meet this requirement, the two sites formed partnerships with programs that used part-time volunteers, but the programs they partnered with were based on models that diverged significantly from Experience Corps' core services and did not contribute to the literacy benefits the program is intended to achieve. Any expansion initiative creates intense, time- and resource-consuming demands on the programs involved, and planners should limit requirements to those that contribute to achieving the central goals of the expansion.

Final Thoughts

Program expansion is a major undertaking. It puts a strain on all aspects of an organization and should be considered only by programs that have evolved well beyond their start-up phase, offer a service that is needed in the community and have reasonable expectations that they can develop or acquire the expertise, financial resources and external relationships they will need to succeed.

The example of Experience Corps showed that successful growth is possible. It requires the flexibility to adapt to changing circumstances while holding fast to what makes the program unique and valuable. Long-term sustainability remains the greatest obstacle to future growth, and convincing policymakers to devote public funds to sustaining even a popular program like Experience Corps may be a significant challenge. Whether the increased visibility and influence that comes from getting bigger can be leveraged into more stable funding for Experience Corps remains to be seen. However, the Experience Corps expansion initiative clearly demonstrates how programs can become stronger, more energized and even more innovative through carefully planned and managed growth, and thus extend the benefits of their services to larger numbers of individuals and communities.

Endnotes

1 The Bridgespan Group. *Growth of Youth-Serving Organizations.* A white paper commissioned by the Edna McConnell Clark Foundation. March 2005.

2 Robert G. Meyers. *Going to Scale.* A paper prepared for UNICEF for the Second Inter-Agency Meeting on Community-Based Child Development, New York, October 29–31, 1984. Retrieved from http://www.ecdgroup.com/download/ac1gsxxi.pdf. May 25, 2007.

3 J. Gregory Dees, Beth B. Anderson and Jane Wei-Skillern. *Pathways to Social Impact: Strategies for Scaling Out Successful Social Innovation.* Duke University Fuqua School of Business, Center for the Advancement of Social Entrepreneurship. CASE Working Paper Series No. 3. August 2002. Retrieved June 24, 2007, from www.fuqua.duke.edu/centers/case/documents/workingpaper3.pdf.

4 Corporation for National and Community Service. *Health Benefits of Volunteering.* April 2007.

5 Nancy Morrow-Howell, professor of social work at Washington University in St. Louis, is conducting additional studies of the Experience Corps program. One is a random assignment study of the program's impacts on students. She is also examining whether and how the program benefits the volunteers.

6 For information on the development of Experience Corps and its early implementation, see Marc Freedman and Linda P. Fried. *Launching Experience Corps: Findings From a Two-Year Pilot Project Mobilizing Older Americans to Help Inner-City Elementary Schools.* Oakland, CA: Civic Ventures. 1999.

7 One study, for example, found that first graders who received tutoring by Experience Corps volunteers using the Book Buddies tutoring program made greater gains in reading compared with control group students who did not receive tutoring. See Joanne D. Meier and Marcia Invernizzi. "Book Buddies in the Bronx: Testing a Model for America Reads." *Journal of Education for Students Placed At Risk*, 6(4), 319–333. 2001. Another study, commissioned by the Corporation for National and Community Service, reported teacher and principal satisfaction with the program and positive gains in students' reading performance and attitudes. Project STAR. *Seniors for Schools Evaluation Results 1999–2000 School Year.* San Mateo, CA: Project STAR. 2001.

8 Peter D. Hart Research Associates. *The New Face of Retirement: Older Americans, Civic Engagement, and the Longevity Revolution: A Survey Conducted for Civic Ventures.* September 1999.

9 Project STAR. 2001.

10 Except for a handful of Experience Corps programs that operated outside of schools during the after-school hours, the program was implemented in schools during the regular school day. Most of the expansion was expected to be to additional schools, although after-school, community-based Experience Corps programs could be "counted" as well.

11 Although 2002–03 was officially a planning year for the two growth sites, this year was sometimes referred to by these sites and Civic Ventures as their first year of expansion, and in fact, both sites began to add schools and volunteers during 2002–03. For this report, we will consider 2002–03 a planning year.

12 Part-time volunteers became part of the Experience Corps model after the two-year pilot period. Although Civic Ventures considered a 15 hour a week, or "full-time," commitment crucial to its goals for both volunteers and children, it recognized that not everyone could commit to such a large amount of time. The part-time position was created as an option for individuals who wanted to serve but could not devote such a large number of hours. This option also enabled sites to keep costs down, as part-time volunteers did not receive a stipend. After the two-year pilot project, Civic Ventures suggested a volunteer pool consisting of two third part-time and one third full-time volunteers.

13 Boston applied for AmeriCorps funding on its own through the Massachusetts Service Alliance, the state's service commission. Unlike the other sites, Boston did not use its AmeriCorps funding to pay volunteer stipends, but rather to support the mostly young AmeriCorps members who served in staff roles in the Experience Corps program.

14 The total amount of funds from the expansion grants that each site would receive over the course of the expansion initiative was determined by Civic Ventures at the outset of the initiative based on the expected size of the site by the fourth year. The amount of these funds that each site received on a year-to-year basis was more or less stable; but as the sites and their budgets grew, they needed to raise a larger sum of money each year to meet their increasing expenses.

15 Civic Ventures assigned Philadelphia the role of lead site for the expansion initiative and did not require the site to submit a written proposal.

16 In schools in Cleveland, Philadelphia and Boston, we sometimes observed volunteers tutoring students at desks set up in the hallways or in cramped storage rooms because of lack of a classroom space.

17 Meier and Invernizzi. 2001.

18 See also Becca Raley. *Rewards of Giving: An In-Depth Study of Older Adults' Volunteer Experiences in Urban Elementary Schools.* Philadelphia: Public/Private Ventures. 2006.

19 The sites also exceeded their goals for the number of children served. In the last year of the initiative (2005–06), the number of students the sites reported serving ranged from rougly 1,260 in Washington to slightly over 6,000 in Philadelphia.

20 Prior to expansion, the expectation was two third part-time and one third full-time volunteers.

21 Unduplicated counts of volunteers who were enrolled in the program during the time-frame of the intake survey, a figure that is needed to calculate the response rate for the survey, were available from four of the five sites: Washington, DC (83 percent response rate), Cleveland (73 percent response rate), Philadelphia (58 percent response rate) and Boston (50 percent response rate, as estimated by Generations Incorporated). These rates are adequately high to allow us to be reasonably confident that the sample surveyed is representative of the larger population of enrolled volunteers in these four sites. We include data from the New York site for which we were unable to calculate response rates because the survey data from this site is consistent with program staff reports about key characteristics of the volunteers. See Appendix A for more details about areas of consistency.

22 US Census Bureau News. Retrieved from http://www.census.gov/Press-Release/www/releases/archives/education/009749.html.

23 There were very few Latino/a volunteers—they were only 1 percent of all survey participants.

24 Philadelphia's rapid increase in the number of schools added in Year Three coincided with the departure of the site's full-time volunteer recruitment coordinator. After her departure, recruitment was carried out by the part-time volunteer trainer, assisted by a handful of part-time staff and volunteers. This situation may have contributed to the challenges in recruiting full teams to serve at these schools.

25 See Raley, *Rewards of Giving*.

26 Philadelphia also tried this strategy. The site developed what it called a Semester of Service (SOS) option, whereby volunteers who served one full day a week (five hours) for four months could receive up to $200 for their service. However, the number of SOS volunteers was relatively small (there were a reported 21 SOS volunteers in Year 2 and 51 in Year 3), so the impact of this strategy on the site's overall recruitment goals for part-time volunteers was modest.

27 The Boston site's database could not generate reports containing this information.

28 See Raley, *Rewards of Giving*.

29 Cleveland was the exception. In Cleveland, each coordinator was in charge of two to four schools, depending on whether they worked full- or part-time. As a result, Cleveland felt that even if it expanded to 16 schools as planned, its field staff was small enough that the program director could manage without adding another management level. Staff support from the host agency of Greater Cleveland, Inc., for fundraising, marketing and other core functions also gave the program director more time to manage field operations.

30 In fact, the program used National Service positions as a way to test and develop talented and dedicated individuals for several of its paid staff positions. The training coordinator was a former Generations Incorporated AmeriCorps member, and a former VISTA was promoted to a paid position as a development assistant.

31 The amount of funds that sites received from the two expansion grants was calculated at the start of the expansion initiative and was based on the projected size of the site by the end of the initiative. The amount of federal AmeriCorps funds each site received also varied depending on the size of the site and how the funds were used. Thus, the amount of matching funds each site needed to raise was quite different.

32 The sites followed the Raising More Money model: See http://blog.raisingmoremoney.com.

33 Philadelphia is not included in this figure, as this was not part of the site's fundraising strategy. During the period of the expansion initiative, the site raised only $5,000 from one foundation.

34 These funds would be used after the expansion grant period ended and are thus not included in tables that reflect funds raised during the initiative.

35 In Boston, the money was used to support a new Math and Literacy Initiative, which the site launched in partnership with Boston Partners in Education, an organization that recruits, trains and places volunteers in schools to provide academic tutoring to children in grades K through 12. Washington used the funds to support the mentoring program that it offered as part of Experience Corps. Only the first year of these mentoring grants is included in Table 8 because sites would not access the rest of the funding until after the end of the expansion initiative.

36 Boston charged a nominal fee of $2,500 but waived the fee if the school could not afford to pay it.

37 The total amounts each site will receive from this grant are as follows: Philadelphia is eligible to receive $650,000; New York and Boston, $405,000; Cleveland, $250,000; and Washington, $200,000.

38 The Bridgespan Group. 2005.

39 One foundation, The Atlantic Philanthropies, has awarded Civic Ventures a three-year continuation grant to pass through to the sites.

Appendix

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Appendix: Methodology and Data Sources

Data collection for the study of Experience Corps' expansion initiative involved both qualitative and quantitative data sources:

Volunteer Intake Survey

A brief volunteer intake survey was administered annually from September 2003 to January 2006. In 2003, all enrolled Experience Corps volunteers were asked to complete the survey. In each of the subsequent two years of data collection, only new volunteers were asked to complete the survey. The survey gathered information in the following categories:

- Volunteer demographics: race, gender, age, education level, marital status and current employment status.
- How the individual learned about Experience Corps volunteer opportunities.
- The reasons why the individual decided to sign up to volunteer for Experience Corps.
- The number of years they have participated in Experience Corps and the number of hours per week they currently serve.
- Current and past volunteer activities.
- Past professional and volunteer experiences with children.

This report relies on surveys of 1,283 volunteers. Unduplicated counts of volunteers who were enrolled in the program during the time frame of the intake survey, a figure that is needed to calculate the response rate for the survey, were available from three of the five sites: Washington, DC (83 percent response rate), Cleveland (73 percent) and Philadelphia (58 percent). These rates are high enough to allow us to be reasonably confident that the sample surveyed is representative of the larger population of enrolled volunteers in these three sites. Boston's figures were not available, but Generations Incorporated's executive director estimated that roughly 50 percent of Boston's volunteers who were targeted to be surveyed did return the surveys. (Those not targeted were 40 individuals who were recruited for Jumpstart, a program that was partnering with the Boston site. Generations Incorporated recruited these volunteers but did not train or place them. Also not targeted to be surveyed was a small group of 10 individuals who were bused to a school from a senior residence.)

We include data from the New York site, for which we were unable to calculate a response rate, because the survey data from this site is consistent with program staff's reports about key characteristics of the volunteers. For example, staff reported that their part-time volunteers appeared to be more affluent than their full-time volunteers, which was consistent with the findings from the site's surveys. New York staff also reported that the most frequent way volunteers learned about Experience Corps was through word of mouth, and their reports matched the site's survey findings.

Research Site Visits and Phone Interviews

P/PV researchers conducted annual intensive research visits to the five expansion sites. The lead and the two scale sites (Philadelphia, Boston and New York), which began expansion in 2002, were visited in February, March or April of 2003, 2004 and 2005. (Because of its size and complexity, we visited the lead site for a fourth time in 2006.) The two growth sites (Cleveland and Washington, DC), each of which began expansion in 2003, were visited in 2004 and 2005. In the final year of expansion we did not visit the sites (except the lead site) but relied on phone interviews with the project director and host agency staff.

During the site visits, P/PV researchers interviewed various program staff, including program and host agency directors and administrators, regional and school coordinators, recruitment and training coordinators, data managers and development staff. We also visited between one and four schools in which Experience Corps was operating, and interviewed the principal or assistant principal and the Experience Corps liaison, and conducted focus groups with Experience Corps volunteers. During the course of the four-year study, we visited between five and eight schools in each site. Interviews were designed to collect information on a range of issues, including program history, volunteer recruitment, conditions and changes within the city's school district, volunteer and school staff satisfaction, administrative infrastructure, staffing structures, staff supervision practices, volunteer training and support, and project management. These yearly visits were supplemented with semiannual phone interviews with the program directors in each site and with staff from the Experience Corps national office.

Review of Program Documents

P/PV also reviewed documents that were submitted to the national office by the expansion sites. These included proposals the sites submitted to Civic Ventures to be considered for inclusion in the expansion initiative, four-year expansion goals and strategic plans, semiannual reports documenting progress toward annual expansion benchmarks, projected and actual budgets, and documentation of fundraising activity.

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