

Growing Bigger Better

LESSONS FROM
EXPERIENCE CORPS'
EXPANSION IN
FIVE CITIES

EXECUTIVE SUMMARY



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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.

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 schools⁵ 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
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.



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