

# AmeriCorps Affiliate Program Management Guidance Updated December 12, 2016

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## Introduction

Congratulations on being selected as an AmeriCorps Affiliate sponsor. We are excited for you to be part of this initiative. Starting a new AmeriCorps Affiliate program requires a significant amount of time and effort and a thorough understanding of program requirements and the Memorandum of Agreement (MOA) that guides AmeriCorps Affiliate Sponsors.

This document is intended to help you with the program start-up process by highlighting requirements and where to find them and helping you become familiar with the requirements that apply to

AmeriCorps Affiliate Sponsors. This document is intended for informational purposes only. If you have any questions regarding your program, please consult your CNCS Program Officer.

## CNCS Staff Roles

**Program Officer (PO):** Your program officer is your primary point of contact with CNCS. Your PO will support you in the implementation of your program, and assist in resolving issues that arise. Program officers review progress reports and monitor programs for compliance with AmeriCorps Affiliate requirements. Program officers work closely with other units at CNCS to provide support to programs and will assist you in connecting to other personnel at CNCS as necessary. As a new program, you are expected to be in regular contact with your program officer. You should set up regular check in calls with your program officer during the start-up period. Your program officer is Patti Stengel. Patti can be reached at [pstengel@cns.gov](mailto:pstengel@cns.gov) or 202-606-6745.

**Trust Officer:** Trust officers work in the National Service Trust, which administers the Eli Segal Education Awards that individuals serving in your AmeriCorps Affiliate program may be eligible to receive. Trust officers are the primary contacts for issues related to the Education Award, such as forbearance, education award, interest payments, etc. Please copy your program officer on correspondence sent to trust officers so that they are aware of ongoing discussions. Your trust officer is Kwame Lake. Kwame can be reached at [klake@cns.gov](mailto:klake@cns.gov) or 202-606-6990.

Please do not hesitate to contact us with your questions and concerns.

## Part 1: Program Start-Up

### Policies and Procedures

The time prior to when AmeriCorps Affiliate members begin serving is known as the program start-up. During the start-up period, you should develop and document policies and procedures that lay the framework for how your program will be managed. A well-written and comprehensive set of policies and procedures will help your program run more efficiently and effectively, while also ensuring compliance with regulatory requirements. Some policies are mandated by MOA requirements, but you will want to create other policies as well that are tailored to your program and your organization.

*Required Policies:* Before you enroll members, you should create policies compliant with AmeriCorps requirements. Refer to your MOA for guidance on developing your policies.

Your program policies and program monitoring must ensure compliance with program requirements, including, but not limited to:

- Non-discrimination
- Prohibited Activities
- Reasonable Accommodation
- Dispute Resolution procedures
- Criminal History Screening
- AmeriCorps Affiliate member safety safeguards
- Site selection criteria and process
- Recordkeeping

- AmeriCorps Affiliate member eligibility documentation
- AmeriCorps Affiliate member information confidentiality

*Program-specific Policies:* Programs also should develop vacation and sick leave policies for members; policies for member selection, evaluation, and termination; standards of member conduct, attendance requirements, and dress codes; requirements of sites for progress reporting, promoting AmeriCorps Affiliate identity, communication hierarchies, etc.

The above-mentioned policies that you develop will serve as the basis for your site and member agreements, which will be discussed later in this document. These policies should be included in any program manual or handbook that you distribute to sites and members. Throughout the life of your program, it is a good idea to continue to develop and refine policies and procedures that guide your program implementation.

*Program Manual:* You are strongly encouraged to create a manual of your program's policies and procedures for easy access by anyone affiliated with your program.

## Site Management

Effective site management is a critical component of a successful program. Key elements include maintaining regular contact with your sites, communicating expectations, providing training and technical assistance, holding them accountable through monitoring and oversight, and developing a strong site network in which all sites are committed to achieving shared program goals. During the program start-up period, please dedicate ample time to putting these site management systems in place.

*Site Agreements:* Site agreements (also called a contract or memorandum of understanding) outline the terms of each site's participation in your AmeriCorps Affiliate program. There should be written agreements with your operating sites as well as with any member service location sites that are part of your program. While you are required to ensure that your sites are aware of all applicable AmeriCorps Affiliate requirements, the content of these agreements is not prescribed by CNCS. Many organizations find it useful for their agreements to include expectations, outline responsibilities, and explain the consequences of non-compliance. Agreements often include how many members will be serving under the contract, member position descriptions, program-specific policies, and references to the AmeriCorps Affiliate MOA. Agreements can clarify which program tasks will be handled by the sponsor and which will be handled by the operating sites. You might also include deadlines for member enrollment, reporting requirements, and any other program administration needs.

## Training and Technical Assistance

It is the responsibility of sponsors to provide orientation, training, and technical assistance to anyone associated with the program, including sponsor organization staff and operating site staff, on the tasks that are required of them.

Many programs find it helpful to spend part of the start-up period developing a staff training plan that consists of one-on-one technical assistance, check-in calls, group conference calls, cross-site mentoring, training calls, and/or site visits, etc.

## AmeriCorps Affiliate Member Management

During the start-up period you will need to prepare systems and tools to manage your AmeriCorps Affiliate members. Member management includes the development of member service agreements, member position descriptions, a recruitment plan, strategies for retention, quality member training, etc.

The start-up period is also the time that you should develop forms that you will use to implement your AmeriCorps Affiliate member document management system.

**AmeriCorps Affiliate Member Service Agreements:** Before starting service, each AmeriCorps Affiliate member must sign a member service agreement. The agreement is an important tool to ensure that your members understand what is expected of them and must be signed before the member begins their service. Please review the MOA for member service agreement requirements.

**AmeriCorps Affiliate Member Recruitment, Eligibility, and Selection:** Many programs think of recruitment as an ongoing process and are always promoting the program. There are many steps a program can take during the start-up period to prepare for recruitment. These include:

- Gaining an understanding of member eligibility requirements and MOA requirements. In addition to age and educational attainment requirements, only U.S. citizens and lawful permanent residents are eligible to serve in AmeriCorps. Please note that the citizenship/lawful permanent resident requirement for service is a stricter standard than eligibility to work in the U.S., thus ***use of the standard I-9 form to check for member eligibility is not sufficient***. Please review the citizenship documentation section of Appendix A.
- Determining whether your program will recruit nationally and/or locally for members and clarifying who will be responsible for recruiting members. Some programs handle all recruitment out of the sponsor organization whereas others handle all recruitment at the operating site or service location level. Many programs share the responsibility with their sites.
- Developing position descriptions for members which must clearly describe the service tasks and responsibilities assigned to the members. Keep your performance measure targets in mind as you create position descriptions so that all of your members are contributing towards the stated outcomes of your project. Keep position descriptions in mind during recruitment so that you can match the right individuals with the right position. Make sure that your position descriptions do not include or put the AmeriCorps member in a situation in which the member is at risk for engaging in any prohibited activity or activity that would violate the non-duplication and non-displacement requirements. Activities must also be within the scope of the MOA and consistent with the approved application. Position descriptions must accurately and completely describe the activities to be performed by each member.

**AmeriCorps Affiliate Member Enrollment:** Prior to a member beginning service, there are several steps that must be taken:

- Parental consent must be obtained for participation by those under 18. Parents must also co-sign required forms.

- A nationwide check of the National Sex Offender Public Website (NSOPW.gov) check must be completed, printed, and adjudicated prior to the member beginning service.
- The member enrollment form must be completed in the My AmeriCorps Portal.
- The member service agreement must be signed by both the member and the sponsor and parent, if member is under 18.

See Appendix A for a complete list of member file requirements. The sponsor versions of the AmeriCorps enrollment and exit forms can be found here:

[www.nationalservice.gov/official-forms/americorps-trust-enrollment-form](http://www.nationalservice.gov/official-forms/americorps-trust-enrollment-form)  
[www.nationalservice.gov/official-forms/americorps-trust-exit-form](http://www.nationalservice.gov/official-forms/americorps-trust-exit-form)

**AmeriCorps Affiliate Member Orientation and Training:** Once AmeriCorps Affiliate members have begun their service terms, programs prepare them for service through orientation and training. Be sure to cover the Prohibited Activities in sufficient depth during orientation.

You should consider including the following topics:

- Introduction to national service and CNCS
- Orientation to the community to be served
- Program rules and expectations
- Review of the member agreement
- Information about benefits through the National Service Trust (education award, forbearance, interest payments)
- Training on service activities
- Member evaluation
- Site-specific information (schedule, dress code, professionalism, workspace logistics, the local community, etc.)

**National Service Trust:** The National Service Trust is an account in the Treasury of the United States from which CNCS makes payments of Eli Segal Education Awards, pays interest that accrues on qualified student loans for AmeriCorps participants during terms of service in AmeriCorps Affiliate positions, and makes other payments authorized by Congress.

After successfully completing a term of service, AmeriCorps Affiliate members who are enrolled in the National Service Trust are eligible to receive an education award. AmeriCorps members can only receive the equivalent of two full-time Education Awards in a lifetime. AmeriCorps Affiliate members may use their education award to pay education costs at qualified institutions of higher education, for educational training, or to repay qualified student loans. The education award for each program year is linked to the value of the Pell Grant, which may change each year. Thus, the amount of an education award may also change annually. To determine the amount of an education award, CNCS will use the amount of the Pell Grant as of October 1 (the first day of the federal fiscal year) in the fiscal year in which the national service position is approved. Please check the most recent AmeriCorps Affiliate application instructions for the education award amount for the current grant year. It is extremely important for programs to indicate the amount of the education award that members will receive for successful completion for a term of service in the members' agreements and reinforce this topic during member orientation. Members can access the award in full and in part, and they may take up to seven years after the term of service has ended to claim the award.

Information about the award amount, eligibility, limitations, a list of colleges and universities that match the education award, forbearance, interest repayment, tax implications, and other important information, including frequently asked questions can be accessed at:

<http://www.nationalservice.gov/programs/americorps/segal-americorps-education-award>

The online My AmeriCorps Portal allows members to request Education Award payments and other benefits, such as Forbearance on student loans and Interest Accrual payments. In addition to other functions, this automated system lets members view the status of requests for education award payments, provides up to date information on education award balances, and allows users to update contact information, view and print tax statements and forms, and access customized letters certifying a term of service with an AmeriCorps program. Members can access My AmeriCorps directly via <https://my.americorps.gov/mp/login.do>. Note: program staff usage and access to My AmeriCorps will be covered in a later section in this guide.

During program start-up, programs should become familiar with the rules and regulations related to the National Service Trust which can be found at

<http://www.nationalservice.gov/programs/americorps/segal-americorps-education-award/amount-eligibility-and-limitations-education>

## AmeriCorps Affiliate Member Enrollment Period

A program's member enrollment period is the time during which AmeriCorps Affiliate members may begin service and does not usually exceed one year. For summer programs, the enrollment period may be much shorter than one year. New programs often incorrectly assume that members who are enrolled during that period must complete service by the end date of the member enrollment period; this is not the case. The length of time members have to complete service is determined by their term of service. Your program design should determine whether your program establishes a set member enrollment deadline within the member enrollment period or whether you allow enrollment to occur throughout the entire period (commonly referred to as "rolling enrollment").

## Performance Measurement and Data Collection

Demonstrating the impact of your program through performance measurement is very important to your success as a sponsor and to the success of AmeriCorps Affiliate. You will report your progress to CNCS twice a year, but you should collect data from your sites throughout the project and aggregate these results to ensure that you are on track. You should spend time during the start-up period developing data collection tools that will allow you to demonstrate the impact of your program. Please visit the CNCS Performance Measurement pages to access helpful resources on performance measurement. The reporting deadlines are found in the Memorandum of Agreement.

## CNCS Electronic Data Management Systems (My AmeriCorps)

You will use the web-based system, eGrants, to access My AmeriCorps for member management. You can access eGrants at [www.nationalservice.gov](http://www.nationalservice.gov) or bookmark this page on your computer:

<http://www.nationalservice.gov/egrants/index.asp>

Each user at a sponsor organization should have a unique login account. Your eGrants account information should not be shared with other members of your staff. The administrator, which is an individual at the Sponsor with the eGrants administrator user role, has the responsibility of determining who at the organization has access to the system.

If you need assistance with eGrants, please contact the National Service Hotline at 800-942-2677, or via the eGrants page. The hours of operation are 9:00 a.m. to 7:00 p.m. Eastern, Monday - Thursday. Please notify your CNCS program officer of any outstanding eGrants issues that are not being promptly resolved by the Help Desk.

My AmeriCorps is the part of eGrants that includes member recruitment and management functionality. It is also the same system that members use to access their education award and other National Service Trust benefits. During program start-up, programs should:

- Choose whether they want site staff to enter member enrollments and exits into My AmeriCorps or whether the parent organization will take responsibility for these functions.
- Determine who will have access to My AmeriCorps at the site and/or parent organization, decide which role(s) and access level each user should be assigned, and then go through the process of having each user create an account. Administrators will have to approve the creation of each account.
- Develop protocols to ensure that you will be able to meet the requirements to enroll members into My AmeriCorps within 30 days of the start of service and exit them within 30 days of the last day of service. **This is a compliance requirement of the sponsor's agreement with CNCS.**

## Part 2: Next Steps – Program Implementation

Once you have enrolled members, you have entered the program implementation stage. Now you can begin using the systems and tools you developed during the program start-up period. The sub-sections that follow provide some tips to help you move forward.

### Ongoing AmeriCorps Affiliate Member Training, Support, and Retention

Throughout the service year programs should continue to implement a training plan for members and ensure that members are getting adequate supervision and support from their sites. A program that has developed a comprehensive training and support plan is likely to achieve good member retention. Providing regular in-service trainings on relevant topics, offering teambuilding and connection to a peer support network, rewarding members throughout their terms, ensuring that members are getting quality supervision, offering frequent opportunities to reflect on service and instill an ethic of service, and providing “Life After AmeriCorps” training are core components of an AmeriCorps training and member support plan. Performance evaluations are not only required, but they are an important part of a member development plan when combined with providing feedback to your members.

### Monitoring

Programs need to ensure that their service locations are aware of their contractual requirements and are in compliance with all of the requirements governing AmeriCorps Affiliate Sponsors.

Providing sufficient oversight of operating sites and service locations is also in the best interest of programs because CNCS holds the sponsor responsible for infractions at the service location level. To achieve quality oversight, program staff must create adequate systems, tools, and protocols for monitoring sites that are fully implemented and available in writing. An adequate monitoring strategy features an array of oversight activities with sites, including:

- document review
- compliance reviews
- program quality and performance reviews
- special audits or surveys
- one-on-one technical assistance to resolve any issues
- special efforts to ensure that prohibited activities are not violated

Sponsors are monitored by CNCS utilizing standard protocols. These may include program monitoring visits, desk review, and training and technical assistance visits. CNCS staff also monitor your performance by reviewing your progress reports. In addition, CNCS's Office of Inspector General (OIG) conducts and supervises independent and objective audits, evaluations, and investigations of CNCS's programs and operations. The OIG is available to offer assistance to AmeriCorps sponsors that become aware of suspected criminal activity in connection with the AmeriCorps program. Sponsors should immediately contact the OIG when they first suspect that a criminal violation has occurred. The OIG may be reached by email at [hotline@cncsig.gov](mailto:hotline@cncsig.gov) or by telephone at (800) 452-8210.

## Reporting

**Programmatic Reporting:** All AmeriCorps sponsors must submit two progress reports per year in eGrants. See the Reporting Requirements section of the AmeriCorps Affiliate MOA for information. We will provide guidance on how to complete your report prior to its due date. Your program officer will review your progress reports and provide feedback.

Sponsors must set their own submission deadlines for their site location programmatic reports that will enable you to provide timely and accurate information to CNCS. We suggest including reporting deadlines on your organizational calendar.

## State Service Commission Collaboration

Collaboration with State Service Commissions is an important and required part of managing a multi-state or single-state AmeriCorps Affiliate program. A State Service Commission is a bipartisan or nonpartisan State entity, approved by CNCS, consisting of 15–25 members (appointed by the chief executive officer of the State), that is responsible for developing a comprehensive national service plan, assembling applications for funding and approved national service positions, and administering national and community service programs in the State.

CNCS expects all non-Tribal multi-state and single-state AmeriCorps programs to collaborate at the local level. Programs are expected to communicate and coordinate with state commissions in the states where they operate, as described in more detail below. The list of state commissions can be found here: <http://www.nationalservice.gov/about/contact-us/state-service-commissions/>

Specifically, programs are required to:

- After an AmeriCorps Affiliate application has been approved, provide commissions with an update of your plans and with the contact information for your local program(s).
- Ensure your local program(s) is on the commission's mailing list.
- Participate in the State Service Commission's development of their state service plan as well as appropriate training and other events.

Commissions provide valuable information about state laws and give you access to local national service contacts for improved collaboration in addressing unmet needs in the state, and they can also offer you program development assistance and provide your AmeriCorps Affiliate members with networking opportunities. Additionally, many commissions host statewide Days of Service, ceremonies for program launch or end-of-service, and inter-corps councils for member networking and input. These opportunities can provide AmeriCorps Affiliate members with important connections to foster a better understanding of national service beyond your program and can assist with member development, training, and morale.

## Days of Service and Other Initiatives

Each year CNCS encourages AmeriCorps programs to participate in CNCS initiatives such as Martin Luther King Jr. Day of Service, 9/11 Day of Service and Remembrance, and AmeriCorps Week. These initiatives present programs with a special opportunity to address unmet community needs, collaborate with other AmeriCorps programs, build corps member morale and teamwork, promote volunteerism and service in local communities, and highlight the difference AmeriCorps members make across the nation. Please refer to the <http://www.nationalservice.gov> website for more information on these initiatives and resources that could help you with getting involved in the Days of Service.

## Renewal of MOA – Application Required

You must submit a new application each year to apply to be an AmeriCorps Affiliate sponsor. The Application Instructions will be publicly posted on the CNCS website prior to the end of your current project year.

## Part 3: How AmeriCorps Affiliate is different from other AmeriCorps programs

AmeriCorps Affiliate provides education awards to individuals serving in positions designated as approved national service positions. Under the AmeriCorps Affiliate program, financial resources for organizations are not available. Below are some of the significant differences between AmeriCorps State and National and AmeriCorps Affiliates:

- Summer AmeriCorps Affiliate members may be as young as 14 years old on the start date of service. Parental consent must be kept on file for all members serving that are under 18.
- For any members serving that are under 16, the AmeriCorps application in My AmeriCorps cannot be used. In order to enroll members that are under 16, the sponsoring organization must invite members to register through the My AmeriCorps Portal or must complete the My AmeriCorps enrollment forms on behalf of the member.
- The Criminal History Check for AmeriCorps Affiliate members is a check of the National Sex Offender Public Website and the screening procedure specified by the sponsor in the approved application.
- Only Summer AmeriCorps Affiliate members are eligible to earn an Education Award for 100 hours of service. Members serving in a 100-hour position may not serve multiple 100 hour terms during one summer. Members serving in 100-hour positions are not eligible to receive a pro-rated Education Award.

- Member may serve no more than 4 terms in any AmeriCorps program. However, the 100 hour service term does not count towards the 4 term rule. Individuals are limited to earning the value of two full-time education awards in their lifetime. Education Awards earned for 100-hour service terms are included in calculating the limit on earning Education Awards.
- If an individual has already received two full time Education Awards and wants to enroll in an Affiliate position, the individual may only do so if they enroll in a full time Affiliate position and will not receive an additional education award.
- The federal statute (42 U.S.C. § 12511 (30)) that states that AmeriCorps State and National Members shall not be considered employees of the organization through which they are serving does not apply the AmeriCorps Affiliate members.

## Appendix A: Member File Requirements

**An AmeriCorps Affiliate member must be a US citizen, national, or lawful permanent resident alien.** The following are acceptable forms or certifying citizenship status as a US citizen or national:

- (1) A birth certificate showing that the individual was born in one of the 50 states, the District of Columbia, Puerto Rico, Guam, the U.S. Virgin Islands, American Samoa, or the Northern Mariana Islands;
- (2) A United States passport;
- (3) A report of birth abroad of a U.S. Citizen (FS–240) issued by the State Department;
- (4) A certificate of birth-foreign service (FS 545) issued by the State Department;
- (5) A certification of report of birth (DS–1350) issued by the State Department;
- (6) A certificate of naturalization (Form N-550 or N-570) issued by the Immigration and Naturalization Service, or
- (7) A certificate of citizenship (Form N-560 or N561) issued by the Immigration and Naturalization service

### **Primary documentation of status as a lawful permanent resident alien of the United States.**

The following are acceptable forms of certifying status as a lawful permanent resident alien of the United States:

- (1) Permanent Resident Card, INS form I-551;
- (2) Alien Registration Recipient card, INS form I-551
- (3) A passport indicating that the INS has approved it as temporary evidence of lawful admission for permanent residence; or
- (4) A Departure Record (INS Form I–94) indicating that the INS has approved it as temporary evidence of lawful admission for permanent residence.

**Secondary documentation of citizenship or immigration status.** If primary documentation is not available, the program must obtain written approval from CNCS that other documentation is sufficient to demonstrate the individual's status as a U.S. citizen, U.S. national, or lawful permanent resident alien.

### **Criminal History Check Documentation.**

A nationwide search of the National Sex Offender Public Website (NSOPW.gov) is required prior to selecting an individual for service. The following documents must be retained:

- A printout of the National Sex Offender Public Website dated prior to start of service. The print out should show that all states were searched and the search was not narrowed to a specific state or zip code or that certain states were not reporting. Documents must show that all hits were adjudicated and resolved prior to start of work or service.
- Hits may be adjudicated through verification of name with photo ID or through other means.
- Documentation that results were reviewed by sponsor staff.

The program must deny participation in their program to applicants who have a conviction for an offense for which sex offender registration is required or have been convicted of murder. Note that the program may establish other disqualifying offenses.

**The following other documents must be maintained in the member file:**

- Parental consent form (if member is under 18 at time of enrollment)
- AmeriCorps Affiliate member application (Program application will suffice. If member applied online, verification can be located in the Trust Portal)
- AmeriCorps Affiliate enrollment form if the member did not certify his/her own in Portal. The enrollment form must include the member signature and date and the certifying official section must be completed and signed by sponsor organization staff.
  
- Member service agreement including:
  - Dates of term on contract
  - Minimum number of service hours and other requirements
  - Amount of Education Award offered for successful completion
  - Description of duties
  - A list of the prohibited and unallowable activities
  - Dispute resolution procedure
  - Civil rights requirements, complaint procedures, and rights of beneficiaries
  - Other requirements as established by the sponsor
  - Standards of conduct, as developed by the sponsor
  - Suspension and termination rules
  - Specific circumstances under which a member would be released for cause
  - The member service agreement must be signed by the member and include a date. The sponsor organization staff signature is recommended, but not required.
- Member media release
- Member evaluations
  - Mid-term (required for HT or FT members)
  - End of term (required for all members)
- Change of Status/Early Release Form (where applicable)
- Documentation of Personal/Compelling Circumstance (where applicable) and documentation is sufficient
- Hours must be tracked to ensure all hours are earned. For a sample timesheet: <http://www.nationalservice.gov/resources/financial-management/generic-sample-ameri-corps-member-timesheets> Member timesheets must include:
  - Member signature and date
  - Appropriate supervisor signature and date
  - Service hours must be tracked separately from training hours
  - If corrections are made, they must be initialed by both the member and supervisor
- End of term/Exit form (if member did not certify his/her own in Portal)

- Member signature and date
- Certifying official section complete and signed