



New AmeriCorps Program Start-up Institute – August 20, 2015

Access the audio recording of this presentation at
<http://www.nationalservice.gov/resources/ Americorps/new-ameri-corps-program-start-institute>



Technology Check



ON THE PHONE:

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- Unmute your line for the Q&A portions of the agenda; press *6 to unmute the line.

ON SKYPE:

- Use the dialogue box on the left side of your screen to provide input or ask a question at any time during the presentation.
- There are two attachments to support this presentation: Resources for New Direct AmeriCorps Grantees and 2015 Checklist for New AmeriCorps Programs.

Start-up Institute

The New AmeriCorps Program Start-up Institute is a series of workshops that are designed to help new CNCS grantees launch successful AmeriCorps programs.

- **Session 1 – July 23, 2015**

Orientation to CNCS; Basic Financial Management; and Criminal History Checks

- **Session 2 – August 20, 2015**

AmeriCorps Member and Site Management; Financial Management Systems

- **Session 3 – September 15, 2015**

New AmeriCorps Program Start-up Grantee Panel at 2015 AmeriCorps State and National Symposium

- **Session 4 – Fall, 2015 and Beyond**

Reporting, Site Monitoring, Member Evaluation, Branding and AmeriCorps Identity

Today's Agenda

- Site Management Overview: Sarah Yue
- Member Management Overview: Kerry Lupher
- Financial Management Systems: Bonnie Janicki
- Closing Remarks

CNCS AmeriCorps State and National

SARAH YUE, PROGRAM OFFICER

Sarah Yue has seven years of experience managing grants for AmeriCorps State and National, the National Science Foundation (NSF), and the National Oceanic and Atmospheric Administration (NOAA), where she has supported a number of new grantees during program start-up and management. She also spent 10 years teaching science at US and international high schools.

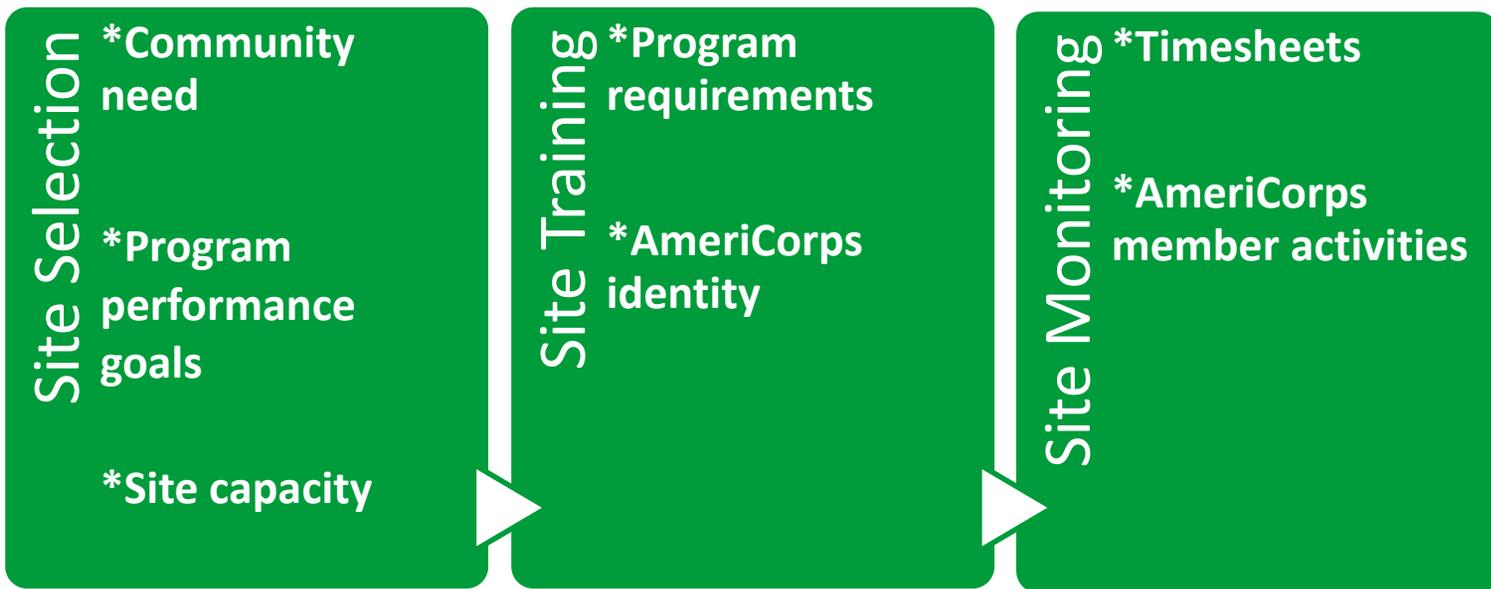


What is a Site?



- AmeriCorps grants typically operate on three levels:
 - Grantee (parent organization)
 - Operating Sites (manage program on state/regional level)
 - Service Locations (where members serve)
- Depending on program design, particular sites may function on more than one level
- The grantee has overall legal, administrative, and fiscal responsibility for the entire scope of the program

Site Management



Role of Sites

- Operating sites and service locations are key players in AmeriCorps member training, support, and supervision
- Grantees must create sound site management practices to:
 - Prevent any non-compliance issues
 - Detect problems if they occur
 - Enforce prompt corrective actions
- Best practice for prevention: Site agreements

Site Agreements



- ✓ Define partnership and service expectations
 - ✓ Delineate responsibilities of each party
 - ✓ Establish clear rules
- ✓ Provide framework for evaluating success
 - ✓ Ensure support system for members

Site Agreements



Site Agreements: Things to Consider

- Clearly define responsibilities for screening member applicants (National Service Criminal History Checks)
- Build in consequences for violations of the site agreement
- Recognize a site agreement is one piece of a larger site management plan

Site Management Resources

- ✓ **Work with your CNCS Program Officer to finalize your site management materials**
- ✓ **EnCorps materials on the National Service Knowledge Network:**

www.nationalservice.gov/resources/encorps

Site Management Q&A



- What questions do you have?
- On the August 20 call, a participant asked: ‘Where can I find examples of site agreements?’
- Answer: Find tips for creating strong site agreements, an outline of a site training manual, and more in the Site and Subgrantee Management eCourse posted on the National Service Knowledge Network:
<http://www.nationalservice.gov/resources/americorps/site-and-subgrantee-management>

CNCS AmeriCorps State and National



KERRY LUPHER, PROGRAM OFFICER

As an AmeriCorps State and National Program Officer, Kerry manages and supports grantee relationships with state commissions in Illinois, Nebraska, and Rhode Island, three Indian tribes, and the US territories of Guam and the Commonwealth of the Northern Mariana Islands. For over 20 years, she has brought positive and transformative change to communities across the nation in her roles as social worker, advocate, consultant, evaluator, trainer and volunteer. Always a farm girl at heart, Kerry is known for being “freakishly strong” and putting in “sweat equity” to get things done for America.

Member Management

- You can find AmeriCorps program requirements for member management here:

www.nationalservice.gov/build-your-capacity/grants/managing-ameri-corps-grants

- AmeriCorps Regulations (45 CFR)
- Annual Grant Terms and Conditions
- Additional CNCS Guidance
 - NOFO
 - FAQs
 - Criminal History Check Resources

Managing AmeriCorps Grants Page

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Build Your Capacity

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 - Managing Senior Corps Grants
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 - Criminal Background Check Requirements
- Learning and Best Practices
- New to National Service
- FAQs

Managing AmeriCorps Grants

AmeriCorps State and National

Rules, regulations, and provisions

Certain key provisions and rules including the single match are only represented in appropriations language.

- The National and Community Service Act of 1990 as amended by the Serve America Act (PDF)
- AmeriCorps Regulations (XML)
 - Update to National Service Criminal History Check Regulations (October 5, 2012) (PDF)
- AmeriCorps Provisions
- AmeriCorps State and National Policy Frequently Asked Questions (updated 7/30/14) (PDF)
- AmeriCorps State and National Compiled Search document (including legislation, 2012 Regulations, 2014 provisions, FAQs, and relevant OMB circulars) (PDF) - *While efforts are made to keep information in this consolidated document current, please consult the primary source for the most up-to-date information. Provisions apply based on the year of the award.*

Search AmeriCorps State and National

Use this search box to find AmeriCorps grant provisions, FAQs, legislation, and regulation.

Enter Search Term(s):
Keywords

Search

My AmeriCorps

The My AmeriCorps website provides a one-stop-shop for all AmeriCorps members and alumni - with information, self-service capabilities and access to the Online Payment System.

Cycle of Program Development



Member Management Flowchart



Member Management Flowchart: Things to Consider

- Member management planning, systems, and activities should include these considerations:
 - Prohibited activities (See AmeriCorps Regulations)
 - Criminal history checks
 - Member grievances (See AmeriCorps Regulations)
 - File management
 - Disability accommodations
 - Member support and experience
 - Alumni engagement

Member Position Development Up Close



Member Position Description Components

- **Member name**
- **Position title**
- **Member tasks and responsibilities (specific)**
- Program overview
- Operating site/service location name
- Brief operating site/service location overview
- Member supervisor name
- Days/hours of service*
- Position start/end dates*
- Outcomes/deliverables
 - Tied to a program's performance measures
- Member training to be provided
- Required member skills and knowledge
- Prohibited activities*
- Include AmeriCorps and organization logos

Resource: Member Position Description eCourse

- Find tips for building and maintaining strong AmeriCorps member position descriptions and examples of different types of descriptions:

www.nationalservice.gov/resources/ameri-corps/member-position-descriptions

Member Service Agreement Contents

2015 AmeriCorps Grant Terms and Conditions, pages 6-7:

- Member position description
- The minimum number of service hours (as required by statute) and other requirements (as developed by the recipient) necessary to successfully complete the term of service and to be eligible for the education award
- The amount of the education award being offered for successful completion of the term of service in which the individual is enrolling
- Standards of conduct, as developed by the recipient or sub-recipient
- The list of prohibited activities, including those specified in the regulations at 45 CFR § 2520.65
- The text of 45 CFR §§ 2540.100(e)-(f), which relates to Non-duplication and Non-displacement
- The text of 45 CFR §§ 2520.40-.45, which relates to fundraising by members
- Requirements under the Drug-Free Workplace Act (41 U.S.C. § 701 *et seq.*)
- Civil rights requirements, complaint procedures, and rights of beneficiaries
- Suspension and termination rules
- The specific circumstances under which a member may be released for cause
- Grievance procedures, including but not limited to 45 CFR §§ 2540.230
- Other requirements established by the recipient

Member File Contents

- Be sure to include:
 - Full member application and screening materials
 - Verification of eligibility to serve
 - Completion of all National Service Criminal History Check required steps (note July 23 presentation)
 - All other documentation required in Grant Terms and Conditions, AmeriCorps Regulations, etc.
- Develop a member file checklist

Member Management Resources

- ✓ Work with your CNCS Program Officer to discuss and finalize materials
- ✓ Get to know your AmeriCorps grantee colleagues
- ✓ Bookmark the Managing AmeriCorps Grants page for easy reference:
www.nationalservice.gov/build-your-capacity/grants/managing-ameri-corps-grants
- ✓ Check out examples of position descriptions, service agreements, and member file checklists on the Knowledge Network:
www.nationalservice.gov/resources/member-and-volunteer-development/encorps

Member Management Q&A

- What questions do you have?

CNCS Office of Grants Management



BONNIE JANICKI, SENIOR GRANTS OFFICER

Bonnie Janicki is a Senior Grants Officer for Grant Operations at the Corporation for National & Community Service, Office of Grants Management. Currently she manages a team of grants officers responsible for the day to day grants management of a diverse portfolio of programs that includes AmeriCorps State and National, Social Innovation Funds, Martin Luther King and many others. Bonnie began her federal service with the Corporation in 1994 and continues to enjoy her work.

AmeriCorps Program Grants Management Systems

Review

Grant Terms and Conditions

- Are issued by CNCS with the Notice of Grant Award
- Are the guiding principles for CNCS-funded grants and cooperative agreements
- Contain program and financial guidelines
- Are binding on the grantee and subgrantee in the same manner

Criminal History Checks

NATIONAL SERVICE CRIMINAL HISTORY CHECKS BASICS:

For staff with no access or episodic access you need two components:

1. NSOPW BEFORE hours start for work.
2. FBI or state checks no later than the first day hours start.

For staff with access to vulnerable populations you need three components:

1. NSOPW BEFORE hours start for work.
2. FBI checks no later than the first day hours start.
3. State checks (state of service and state of residence) no later than the first day hours start.

BOOKMARK THIS PAGE FOR ALL THINGS NSCHC:

www.nationalservice.gov/resources/criminal-history-check

System Set Up and Review

Efficient Accounting Systems

Distinguish between:

- grant vs. non-grant related expenditures
- CNCS vs. grantee share
- direct and indirect costs
- program years
- budget categories

All costs charged to the grant must be supported by clear documentation

What is in your financial house?



Characteristics of Organizations with Highly Effective Financial Management

- Written and followed policies and procedures
- Qualified and trained financial staff
- Effective communications
- Succession planning and cross-training
- Self-assessment and continuous improvement
- Active, knowledgeable, and informed Board and finance committee

Policies & Procedures

- Policies and procedures are a set of written documents that describe an organization's:
 - policies for operation – “what is to be done”
 - the procedures necessary to fulfill the policies – “how it is to be completed”
- All staff must be familiar with these documents
- Documents must be kept up-to-date
- Documents should explain the rationale and include principal transactions and completed forms
- Documents must incorporate federal and CNCS grant regulations and terms and conditions

Documentation Basics

What do we document?

EVERYTHING!

All expenditures charged to the grant, INCLUDING:

- Match
- In-kind

Documentation Basics



Why retain documentation?

- To track incoming information
- To review information
- To provide historical evidence
- To provide evidence of accomplishments
- To prepare for an audit

Defining Source Documentation

- Physical information:
 - Hard copy
 - Soft copy: CD, flash drive, server, microfilm
- Source:
 - Internal to the organization
 - External sources
- Benefits → supports a value, cost, or performance criteria related to the grant

Documentation of Staff Time

- Critical for staff to document time charged to both federal and grantee share of the budget
- Particularly important for staff working on multiple projects to document actual time spent on multiple projects
- Timesheets are required

Key Elements of Financial Reporting

- Prepare all financial reports with information from the organization's accounting system
- Review and reconcile the information to ensure accuracy prior to report submission
- Ensure files have the proper documentation to support all information reported in financial reports
- Submit all reports on time

Financial Management Resources

- ✓ **Terms and Conditions**
- ✓ **Regulations**

www.nationalservice.gov/build-your-capacity/grants/managing-ameri-corps-grants

- ✓ **Trainings**

www.nationalservice.gov/resources/financial-management

Financial Management Q&A

- What questions do you have?
- On the August 20 call, a participant asked: ‘In regards to the criminal background checks, has the FBI Channeler DO Temporary Exemption from June 16th been updated?’
- Answer: There was a minor edit made to the June 16 guidance, but it did not alter the content. You can access it here: <http://www.nationalservice.gov/resources/criminal-history-check>

Wrap Up for Today



- Resources on the CNCS website
 - www.nationalservice.gov
 - Grant Terms and Conditions, Regulations, NOFO
- Resources on the National Service Knowledge Network
 - www.nationalservice.gov/resources/americorps
 - Start-up Institute Recordings, Slides
- Reminder: Be sure to register for the ASN Symposium
 - <http://americorps.hb-co.com/index.htm>
- Reminder: New AmeriCorps Program Start-up Grantee Panel
 - September 15, 2:30 – 4:00 pm, Arlington, VA

Thank You!



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