



## Monitoring AmeriCorps Members and Sites – Recorded on March 17, 2016

*Be sure to access the recording to accompany this material at  
[www.nationalservice.gov/resources/ameri-corps](http://www.nationalservice.gov/resources/ameri-corps).*



# Technology Check



- Be sure to access the recording to accompany this material at [www.nationalservice.gov/resources/amicorps](http://www.nationalservice.gov/resources/amicorps).
- Use the Chat Box to ask a question or make a comment at any time during the presentation.
- Please take a moment to send a greeting out to all participants on today's session via the Chat Box.

# Today's Agenda



- Monitoring Members and Sites: Barbara Ellen Reynolds
- Program Spotlights:
  - Rural Alaska Community Action Program: Eric Milliken
  - Jesuit Volunteer Corps Northwest: Jeanne Haster
  - Catholic Charities USA: Jean Beil
- Closing Remarks

## BARBARA ELLEN REYNOLDS

- ✓ AmeriCorps State and National Training Specialist
- ✓ Former Director of State Service Commission
- ✓ Former AmeriCorps State Program Director

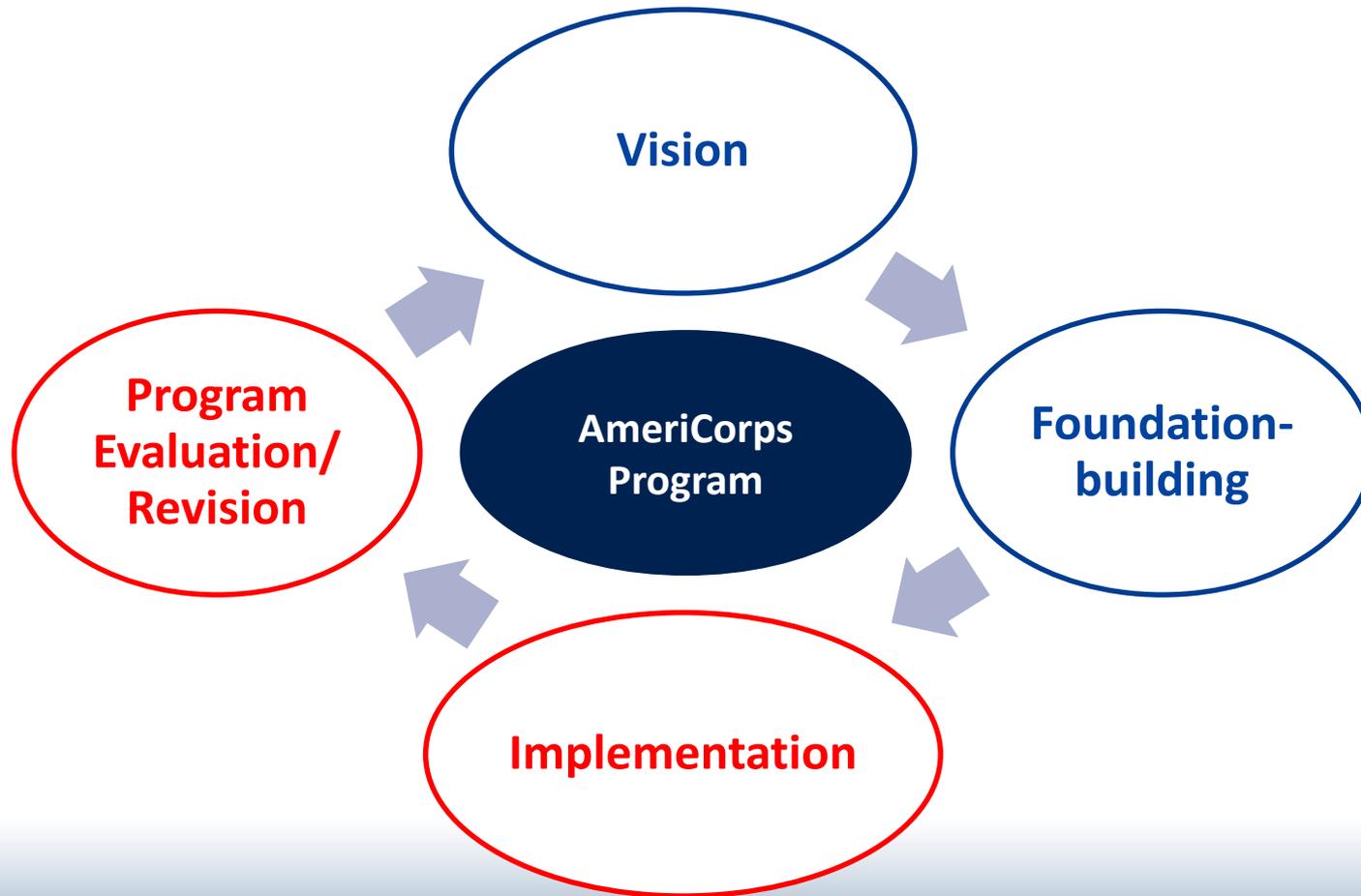


# Monitoring AmeriCorps Members and Sites

- ***CNCS Discussion Points***

- What am I required to monitor?
- How am I required to monitor my program?
- What if I find something wrong?

# Cycle of AmeriCorps Program Development



# Grantee Requirements—Monitoring

## 45 CFR § 2541.400 Monitoring and reporting program performance.

(a) *Monitoring by grantees.* Grantees are responsible for managing the day-to-day operations of grant and subgrant supported activities. Grantees must monitor grant and subgrant supported activities to assure compliance with applicable Federal requirements and that performance goals are being achieved. Grantee monitoring must cover each program, function, or activity.

# Another Way to Think about Monitoring

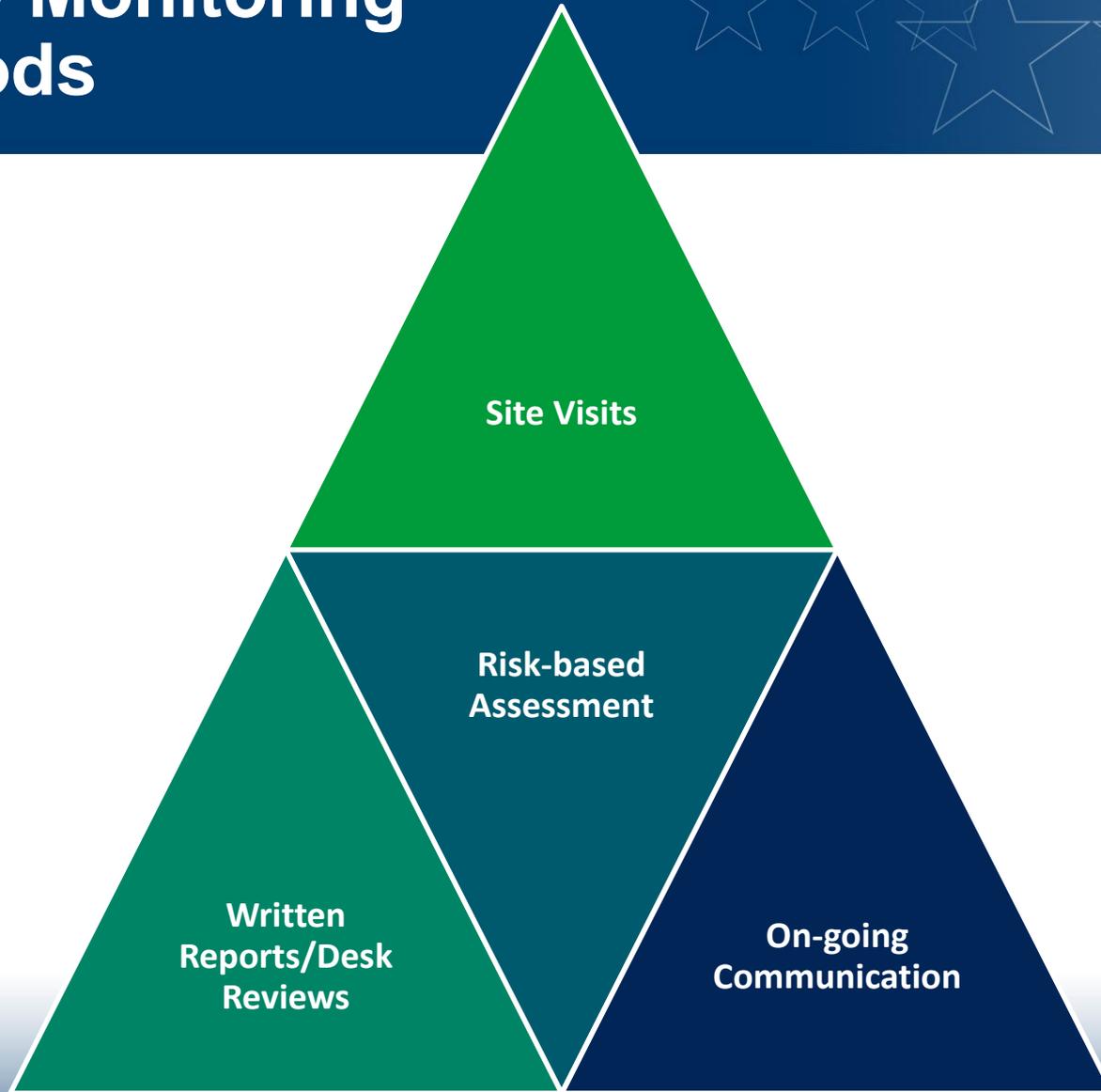


# Monitoring Plan



- When? Schedule of monitoring activities; align with AmeriCorps grant year deadlines
- Who? Program staff roles
- What? All aspects of AmeriCorps-funded activity (budget, members, sites, performance measurement/data collection)
- Why? Prevent, detect, and enforce; continuously improve program delivery
- How? Methods depend on program design, risk

# A Few Monitoring Methods



# Risk-based Assessment

## *Be on the lookout for:*

- Prior compliance problems – especially those that involved prohibited or unallowable activities
- Low accomplishment/performance
- Significant distance from AmeriCorps program staff
- Site staff turnover
- Low quality and/or late reporting
- Excessive absence from training and/or site

# Monitoring Members



## *Keep a close eye on:*

- Service hours – verify timesheets are correct; members are on track to successfully complete the term and earn the education award
- Service activities – verify every member activity is within the scope of approved grant and member position description; no violation of federal rules (i.e., prohibited or unallowable activities)

# Sample Member Position Description

Component	Description
AmeriCorps Member Name	Jeff A. Member
AmeriCorps Position Title	Emergency Response Crew Leader (ERCL)
Program	Helping Hands, 911 Safe Place, Waverly, PA 45678
Site Location	The member will be based at Helping Hands, 911 Safe Place, Waverly, PA 45678; deployments may occur at any location in the state
Purpose	Provide local response in the aftermath of natural disasters
<b>Duties</b>	<b>Provide food, water, and shelter to people in need; lead a team of 8 first-year AmeriCorps members in emergency response; deployments last one week – multiple months</b>
Qualifications	Able to lift and move 50 lbs of supplies multiple times each day; able to work in close contact with emergency responders and citizens during crises; demonstrated ability to lead effective teams, problem-solve, and resolve conflicts; pass all required criminal history and medical checks; excellent communication skills; able to remain calm in a crisis
Term of Service	November 1 – September 30
<b>Time Requirements</b>	<b>40 hours/week; exact days of week and times will vary depending on response situation</b>
Orientation and Training	25 hours pre-service; 50 hours in-service; topics include CPR, emergency response protocol, team management policies and procedures, AmeriCorps regulations and national network, and leadership
Benefits	Living allowance, post-service education award, health care; powerful service experience; able to see impact of service immediately
<b>Evaluation and Reporting</b>	<b>Mid and final performance reviews; weekly reports to supervisor; quarterly debrief summits with crew members and program leadership</b>
Supervisor	Jane S. Super, Executive Director, Helping Hands

# Monitoring Sites



## *Keep a close eye on:*

- Member supervision – verify timesheets are signed by direct supervisor
- Service activities – verify every member activity is within the scope of the approved member position description and site agreement; no violation of federal rules (i.e., prohibited or unallowable activities)

# Sample Site Agreement

*The following Memorandum of Understanding (MOU) establishes an agreement and specific responsibilities for both the AmeriCorps program and the site. This agreement is in effect from November 1 – September 30, 20XX.*

## **PROGRAM AND SITE PARTNERSHIP GOALS**

### **ALL:**

- The site staff and AmeriCorps member (ACM) agree to work together to achieve the program goals outlined in the site application and partnership negotiation correspondence.
- The site staff and ACM will work together to develop program goals and objectives and will review changes with program staff.

## **ROLES AND RESPONSIBILITIES**

### **AMERICORPS PROGRAM:**

- Train ACM and site staff in best practices of service program delivery.
- Give technical assistance and support to strengthen the site's program.
- Administer all AmeriCorps enrollment requirements.
- Lend marketing support to site and its service activities.

### **SITE:**

- Recognize ACM and the AmeriCorps program and identify ACM by name and title in all program and marketing materials.
- Fully orient staff, current volunteers, and other important stakeholders to the AmeriCorps program agreement and requirements.
- Ensure adequate workspace including a phone, desk, and access to a computer and the Internet by the first day of the ACM's term of service.
- Provide the ACM with a thorough orientation and direct supervision (to include at least four hours per month).
- Participate in four training days with the AmeriCorps program over the course of the program year.
- Adhere to AmeriCorps regulations and the AmeriCorps Program Policies and Procedures.

# Corrective Action



- ***What if I find a problem? Standard steps to take include:***
  - Establish clear corrective policy and procedures in program foundation-building phase
  - Document problem
  - Provide correction
  - Re-train staff and/or members
  - Notify commission or CNCS if appropriate
  - Follow-up within a reasonable period to confirm correction

# Monitoring AmeriCorps Members and Sites

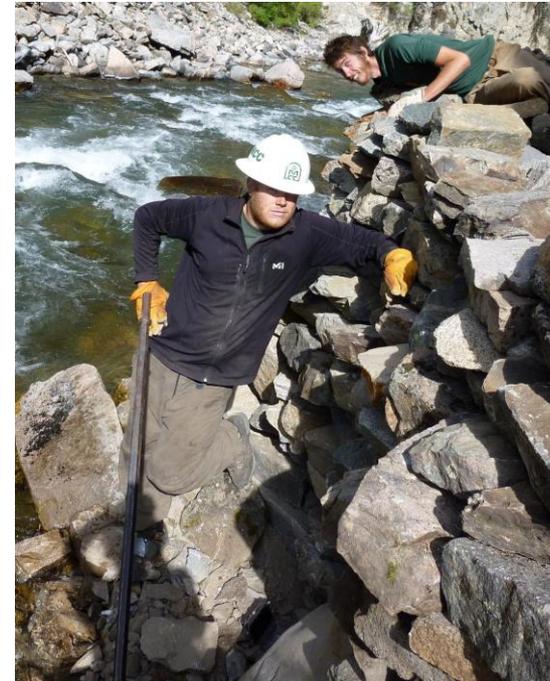
- ***CNCS Discussion Points***

- Grantee requirements in CFR
- Monitoring as part of the Cycle of AmeriCorps Program Development
- Elements of a member and site monitoring plan and risk-based assessment
- Member position descriptions and monitoring
- Site agreements and monitoring
- Examples of corrective actions

# Rural Alaska Community Action Program

## ERIC MILLIKEN

- ✓ Community Development Program Manager at RurAL CAP
- ✓ Alumnus of Montana Conservation Corps
- ✓ Experience with curriculum development, crew leader training, and energy conservation in Alaska
- ✓ Member of the Alaska State Service Commission



# Program Spotlight: Rural Alaska Community Action Program



# Agency Structure



AmeriCorps-funded (in part or whole):

- Executive Director
- Division Director
- Program Manager
- Program Coordinator
- Budget Coordinator
- Human Resources

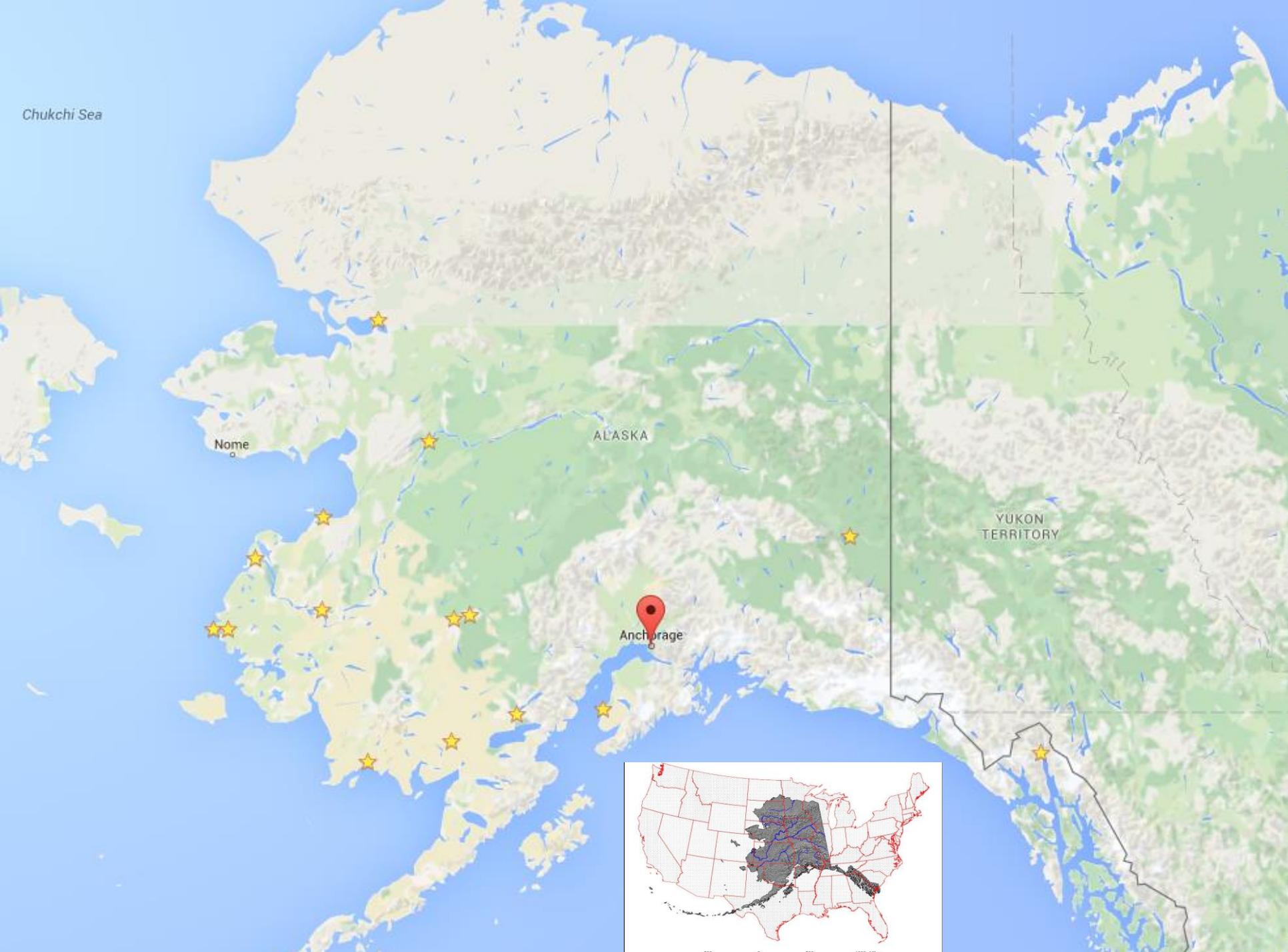
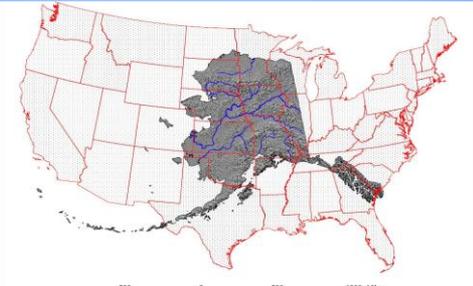
Chukchi Sea

Nome

ALASKA

YUKON  
TERRITORY

Anchorage



# Risk Assessment: Rural Alaska Community Action Program

- Prior compliance problems – especially those that involved prohibited or unallowable activities
- Low accomplishment/performance
- Significant distance from AmeriCorps program staff
- Site staff turnover
- Low quality and/or late reporting
- Excessive absence from training and/or site

# Cultivate Member Buy-in



# Cultivate Site Supervisor Buy-in

- Training Webinars
- Site Visits
- Thank You's
- Attending the 'usual' conferences

# Develop Member Support Structures



# Reward Achievements



# Ensure Timely and Accurate Reporting



# Compile Data in Real Time

The screenshot shows a web browser window with the URL <https://engineuity29.esserver.com/AES039.Engineuity.Web/Default.aspx>. The browser's address bar and navigation tools are visible. The application interface includes a sidebar with a tree view containing 'Management Report', 'Inventory', 'AdHoc Report', 'Design', 'View Builder', 'Query Builder', and 'Permission'. The main content area is titled 'RAY Management Report[Inventory]' and features a search bar with a 'Favorite' category dropdown and a 'Search' button. Below the search bar is a table with the following data:

Drag a column header and drop it here to group by that column						
Popup	Favorite	Report Name	Category Name	Description	Date Published	
>	<input checked="" type="checkbox"/>	<a href="#">AKm_RAY_Community_Participants</a>	Custom	Pulls all client names and first activity date who've attended a RAY event; organized by ci	2/25/2016 11:00:00 PM	
	<input checked="" type="checkbox"/>	<a href="#">AKm_RAYActivityCount</a>	Custom	Provides detail of youth activity records for RAY program by Program Component (commi	3/2/2016 11:00:00 PM	
	<input checked="" type="checkbox"/>	<a href="#">AKm_RAYDemoCheck</a>	Custom	Shows missing RAY demos by program component (community	3/2/2016 11:00:00 PM	
	<input checked="" type="checkbox"/>	<a href="#">Section G Client Demographics Details Family_AK</a>	Custom	Client Demographics Details Family_AK	1/23/2016 3:37:33 AM	
	<input checked="" type="checkbox"/>	<a href="#">Section G Details Individual_AK</a>	Custom	Client Demographics Details Individual_AK	1/23/2016 3:37:33 AM	
	<input checked="" type="checkbox"/>	<a href="#">Section G_AK</a>	Custom	Section G_AK	1/23/2016 3:37:33 AM	

# In-person Monitoring



- Goals:
  - Foster buy-in
  - Check in on progress
  - Build member supports
- Tips for doing so:
  - Plan to help your member on their project (maybe take over some of the planning if you can).
  - Spend **at least** one entire day with them.
  - Sit down with member and Site Supervisor individually and then together.
  - Reward your member.

# Fiduciary Compliance

- Federal grants are complex.
- Get yourself a Gloria.
- Give Gloria the corner office.



# Wish List



- Administrative staff to enter data / manage member files.
- Additional revenue to bring in Site Supervisors for training.

# Program Spotlight: Jesuit Volunteer Corps Northwest

## JEANNE HASTER

- ✓ Executive Director, Jesuit Volunteer Corps Northwest since 2004
- ✓ Program Director, JVC Northwest AmeriCorps program since 2010
- ✓ Over 30 years of experience in nonprofits and education



# Program Spotlight: Jesuit Volunteer Corps Northwest

- National Direct AmeriCorps program with outreach across the 5 states of the Northwest
- AmeriCorps members positively impact 21 communities in the Northwest through capacity building, education, and health services
- Staff structure:
  - Program Director & Director of Programs
  - AmeriCorps Program Manager
  - Recruitment and Marketing Manager
  - Jesuit Volunteer Program Manager
  - Program Coordinators
  - AmeriCorps Administrative Assistant/Program Assistant
  - Business Manager/Business Assistant

# Program Spotlight: Jesuit Volunteer Corps Northwest



- 135 amazing AmeriCorps members serve in social service sites; schools, primarily with Native American and Native Alaskan children; and community health facilities.

# Program Spotlight: Jesuit Volunteer Corps Northwest

## PRIOR TO MEMBER SERVICE:

- Pre-Interview AmeriCorps Member Webinar
- Interview/Communications throughout member selection process
- Completion of Criminal History Check process - on time all the time!
- Orientation week with guidance on:
  - Position description/Required Hours/OnCorps Tracking
  - Prohibited Activities
  - Performance Measurement/Evaluation Requirements
- Member Contract/Placement Agreement

# Program Spotlight: Jesuit Volunteer Corps Northwest



## DURING MEMBER SERVICE

- Two Area/Site Visits – Area Visit report
- Monthly AmeriCorps Newsletter/Communication
- Quarterly Retreats/Leadership Development Weekends
- Tracking throughout the service term:
  - Member enrollment/exit from eGrants
  - Criminal History Checks
  - Timesheet submission
  - Performance measurement
  - Member evaluations

# Program Spotlight: Jesuit Volunteer Corps Northwest



## SITE SUPERVISION/MONITORING

- Agency Application and Review
- Pre-service Site Supervisor Webinar
- Placement Agreement/Site Supervisor contract
- Site Supervisor on-going communication
- Site Supervisor area/site visits
- Site Monitoring tool
- Collective Site Supervisors' Locale Meeting
- Site Supervisor Webpage

# Program Spotlight: Jesuit Volunteer Corps Northwest



## SUCSESSES!

- OnCorps greatly assists in timely submission/ approval of timesheets, Direct Service Activities, Great Stories, and Volunteer Mobilization;
- Site Supervisor webpage has improved communication and access to all needed materials throughout the service year;
- Monthly AmeriCorps newsletters provide regular information with reminders for timesheet submission, performance measurement, evaluation input, and continual reminders of AmeriCorps regulations.

# Program Spotlight: Jesuit Volunteer Corps Northwest



## MORE SUCCESSES!

- Site monitoring tool;
- Locale meetings for site supervisors to learn more about AmeriCorps, best practices, and collaborative projects.

# Program Spotlight: Jesuit Volunteer Corps Northwest



## CHALLENGES:

- Site Supervisor turnovers during the service year;
- Timesheet completion can sometimes take secondary priority to the service;
- Communication challenges due to many rural and remote locales.

## WISH WE HAD KNOWN:

- Can never do enough training!
- More training for sites/site supervisors in performance measurement/evaluation.

# Program Spotlight: Catholic Charities USA



## JEAN BEIL, LCSW

- ✓ Vice President for Programs and Services
- ✓ National Office of Catholic Charities USA; network of 2,700 agencies serving 9 million people
- ✓ Dual Master's in Social Work and Religion





***What questions do you have?***

# Wrap Up for Today



- Resources at [www.nationalservice.gov](http://www.nationalservice.gov)
  - Grant Terms and Conditions
  - National Service Knowledge Network: e-Courses on site and member management ([www.nationalservice.gov/resources/online-courses](http://www.nationalservice.gov/resources/online-courses))
- Next Sessions:
  - April 5, 3:00 – 4:30 pm Eastern; Disability Inclusion
  - April 14, 3:00 – 4:30 pm Eastern; Program Sustainability

# Thank you!

