



New AmeriCorps Program Start-up Institute – March 19, 2015



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2014 – 2015 Start-up Institute

Session 1 – July 23, 2014
Orientation to CNCS and Basic Financial Management

Session 2 – August 20, 2014
Member and Site Management; Financial Management Systems

Session 3 – September 17, 2014
Program Start-up Grantee Panel

Session 4 – January 27, 2015
Grantee Reporting (progress and financial)

Session 5 – February 19, 2015
AmeriCorps Member Evaluation and Support

Session 6 – March 19, 2015
Monitoring Members and Sites

Session 7 – June 25, 2015
Program Year Confluence

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Today's Agenda



- Monitoring Members and Sites: Barbara Ellen Reynolds
- Program Spotlight: Alexandro Simental, Ysleta del Sur Pueblo
- Closing Remarks

CNCS AmeriCorps State and National

BARBARA ELLEN REYNOLDS, TRAINING SPECIALIST

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



Monitoring AmeriCorps Members and Sites

- ***Key Points***

- Grantee requirements in CFR
- Monitoring benefits
- Elements of a member and site monitoring plan

Terms and Acronyms

AmeriCorps Grant Provisions

Code of Federal Regulations (CFR)

Notice of Grant Award (NGA)

Operating Site

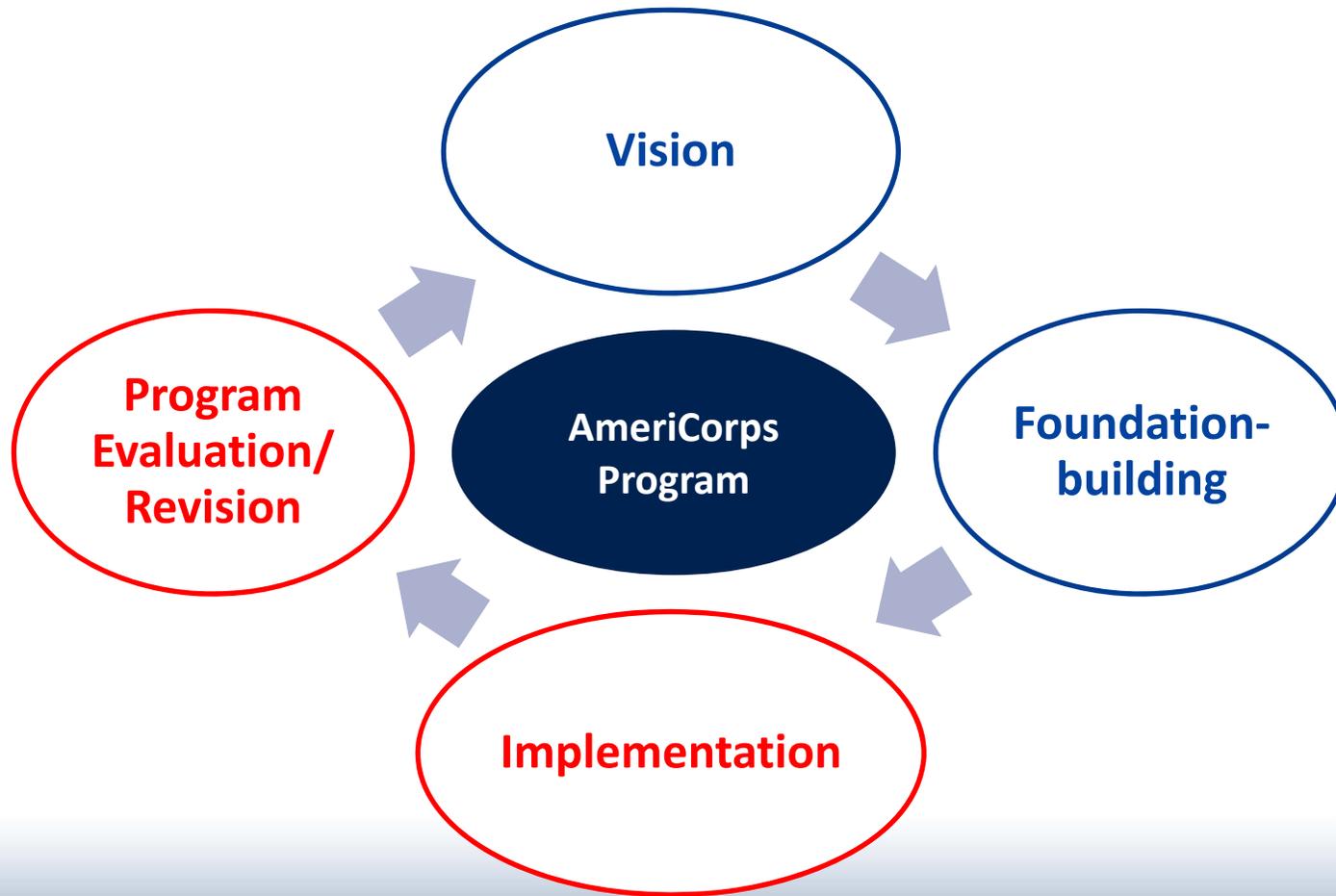
Portal

Prime Grantee

Service Site

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Cycle of AmeriCorps Program Development



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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.

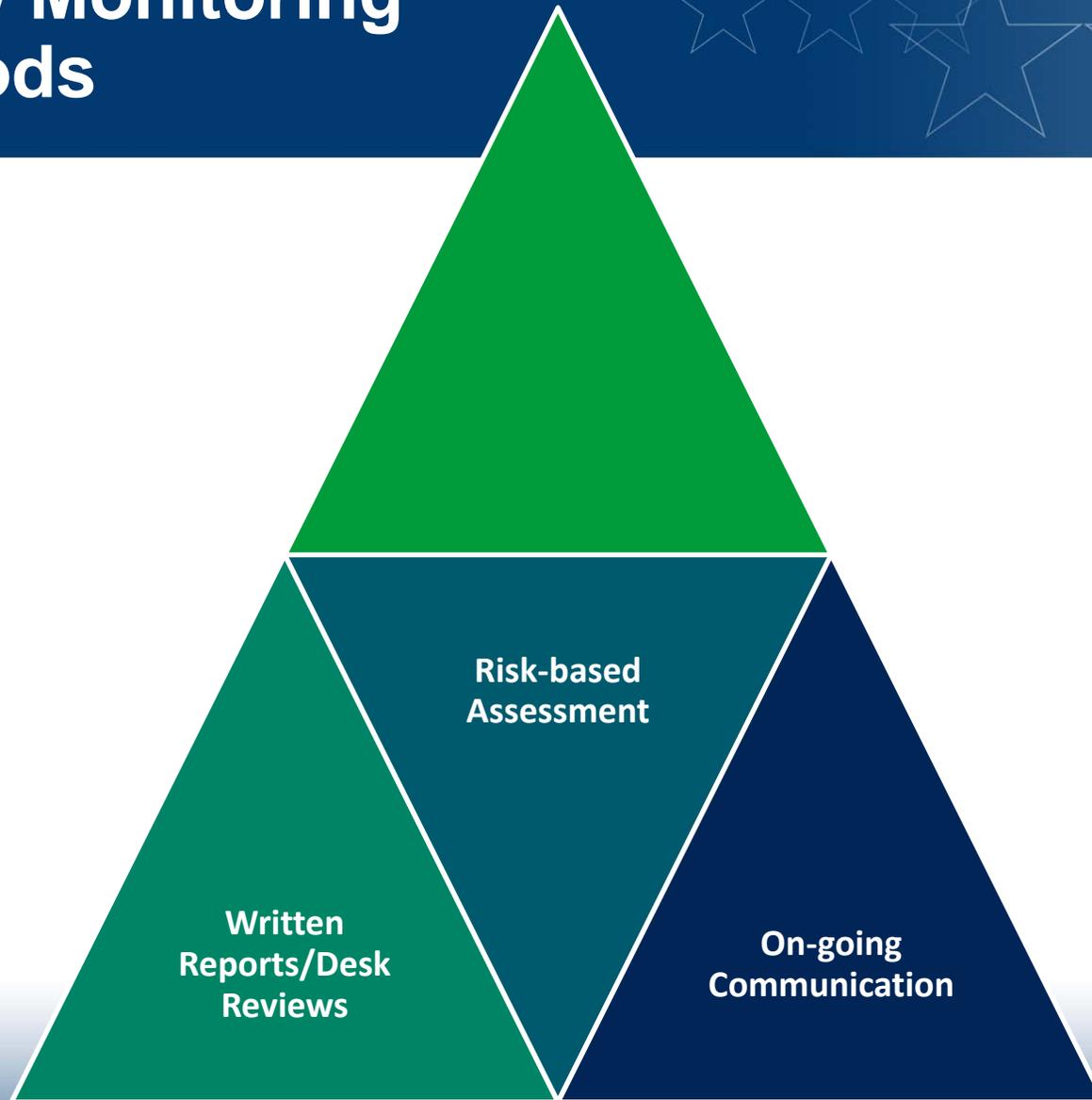
Another Way to See Monitoring



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 measures)
- Why? Prevent, detect, and enforce all federal rules; continuously improve program delivery
- How? Methods depend on program design, risk

A Few Monitoring Methods



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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
Duties	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
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
Time Requirements	40 hours/week; exact days of week and times will vary depending on response situation
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
Evaluation and Reporting	Mid and final performance reviews; weekly reports to supervisor; quarterly debrief summits with crew members and program leadership
Supervisor	Jane S. Super, Executive Director, Helping Hands

Monitoring Sites



Keep a close eye on:

- Member supervision – verify timesheets
- 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.

CNCS Monitoring Tool

Compliant (Y/N)		Description	Type		Initial Assessment	
	N/A		Prevent	Detect	Enforce	good strategies needs improvement
<p>Member Management</p> <p>The Member Management section includes elements required for compliant systems, policies and processes related to member support, enrollment, recruitment and retention.</p>						
<p>Commissions and Directs:</p>						
1		Verify member eligibility [45 CFR § 2522.200]				
<p>see the "Member Eligibility" tab for the regulation and the "Member Documents" Tab for a complete check list of required documents.</p>						
2		Ensures that member eligibility documentation is reviewed and found satisfactory prior to enrollment. [AC IV]				
3		Ensures that records documenting satisfactory completion of program requirements are maintained as required. [AC IV]				
4		Ensures that criminal history checks conducted on members and staff listed in the budget (CNCS or match share). [45 CFR § 2522.205-207 and 45 CFR §2540.200-207]				
<p>see "Criminal History" tab in spreadsheet</p>						
5		If the commission/direct uses an alternate search protocol to conduct criminal history checks, has it been approved by CNCS. [45 CFR § 2540.206]				
6		Ensures that AmeriCorps members are selected in a fair and non-discriminatory manner [45 CFR §2522.210 (a), 2522.100(g) & 2540.210, AC.V]				
7		Ensure member position descriptions provide for meaningful service activities and performance criteria that are appropriate to the skill level of members. [AC IV]				
<p>Ensures that members are aware of prohibited activities and that prohibited activities are not</p>						

Corrective Action

- *What if I find a problem? Standard steps to take include:*
 - Document
 - Re-train staff and/or members
 - Provide correction
 - Notify CNCS if appropriate
 - Follow-up within a reasonable period to confirm correction

Maryland Program Example

Monitoring Members

- ✓ Service hours
- ✓ Service activities, results
- ✓ Training and professional development
- ✓ Life after AmeriCorps

Monitoring Sites

- ✓ Member timesheets
- ✓ Supervisory meetings
- ✓ Site Supervisor training and partnership support
- ✓ Partnership goals

Lessons Learned

- Check your assumptions
 - Program fluency (goals, rules)
 - Program buy-in (national service, member development)
- Double check your math
 - Member timesheets
 - Reporting data
- Invest in staff training to support monitoring
 - Site Visit Manual
 - Worst Case Scenario Addendum

Monitoring AmeriCorps Members and Sites

- ***Key Points***

- Grantee requirements in CFR
- Monitoring benefits
- Elements of a member and site monitoring plan

What questions do you have?

Program Spotlight: Ysleta del Sur Pueblo – Target Tigua



ALEXANDRO SIMENTAL, DIRECTOR, ECONOMIC DEVELOPMENT DEPARTMENT, holds a Bachelor’s Degree in Communications from the University of Texas at El Paso. Bringing over 20 years of experience, Mr. Simental’s contributions to the Pueblo are represented in various grant-funded programs. His experience includes the creation and inception of systems-change programs for the Upper Rio Grande Workforce Development Board and numerous community-serving organizations throughout the West Texas region, focusing on increasing access to health care, education and employment for persons with disabilities, first generation college students, and other underserved and economically disadvantaged community members.

Ysleta del Sur Pueblo Overview

- Location: El Paso County, Texas
 - Nation Building/Cultural Education (4 half-time members)
 - Financial Literacy (2 half-time members)
 - Environmental Stewardship (1 half-time member)
 - VITA (2 half-time members)
 - Entrepreneurial Education (2 half-time members)
- Program offerings are focused on building knowledge and skills among Tribal members, except VITA which provides tax preparation services to the community.
- Host Sites: the Tribal Departments of: Economic Development, Empowerment (Education), Environmental & Natural Resources

Member Monitoring



Program tools to track and monitor progress:

- Program Ledger – keeps track of member time, showing hours accumulated and time balance.
- Program Progress Report – a narrative submitted by the host sites to the EDD just prior to the mid-year and year-end reports.
- Program Workbook – used to record program activities, such as educational sessions, events, and training. Submitted to EDD just prior to the mid-year and year-end reports.
- Program Monitoring Tool – tailored for each host site/program offering.

Site Monitoring



Host site specific tools and processes:

- Target Tigua host sites use a variety of pre- and post-tests to measure knowledge gains
- Participant Satisfaction Surveys to glean feedback from participants
- Self-assessment of program offerings (i.e. educational sessions)
- Monthly member development meetings provide the opportunity to glean member feedback

Site Monitoring

- Monitoring occurs at least once per program year for each program/host site.
- Monitoring tools – a monitoring tool is developed for each Target Tigua AmeriCorps program.
 - Example: Financial Literacy
 - www.nationalservice.gov/sites/default/files/resource/Target_Tigua_Self_monitoring_Financial_Literacy_Sample.pdf (PDF)
 - www.nationalservice.gov/sites/default/files/resource/Target%20Tigua%20Self-monitoring%20Financial%20Literacy%20Sample.docx (DOCX)
 - Example of Feedback: Feedback Letter
 - www.nationalservice.gov/sites/default/files/resource/Target_Tigua_Site_Feedback_Letter.pdf (PDF)
 - www.nationalservice.gov/sites/default/files/resource/Target%20Tigua%20Site%20Feedback%20Letter.docx (DOCX)

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Monitoring and Agency Data Collection

- Self-Evaluation on Educational Sessions:
 - Example: Tool Template
 - www.nationalservice.gov/sites/default/files/resource/TargetTigua_Self_Monitoring_Evaluation_Template.pdf (PDF)
 - www.nationalservice.gov/sites/default/files/resource/Target%20Tigua%20Self-Monitoring%20Evaluation%20Template.docx (DOCX)
- This type of evaluation helps to track performance over time.

Program Experience



Lessons Learned:

- Take time to learn the eGrants system
- Ensure that your program policies address all key areas

Program Strengths:

- Staff knowledgeable in program development
- Staff expertise in self-assessment processes served to create self-monitoring process
- Great network of partners and host sites

Ysleta del Sur Pueblo Spotlight

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Wrap Up for Today



- Resources at www.nationalservice.gov
 - Grant Provisions
 - National Service Knowledge Network: e-Courses on site and member management (www.nationalservice.gov/resources/online-courses)
- Next Session: June 25, 3:00 – 4:30 pm Eastern; AmeriCorps Program Year Confluence (2014 to 2015)

Thank You!



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