



AmeriCorps Program Development: Monitoring AmeriCorps Members and Service Sites



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AmeriCorps Program Development: Monitoring AmeriCorps Members and Service Sites



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Today's presentation will be posted on the National Service Knowledge Network: www.nationalservice.gov/resources

Today's Speaker



Barbara Ellen Reynolds

- ✓ **AmeriCorps State and National Training Specialist**
- ✓ **Former Director of state commission**
- ✓ **Former Director of AmeriCorps State program**

AmeriCorps Program Development Series

The AmeriCorps Program Development Series is designed to build knowledge in core AmeriCorps program areas. The 2016-2017 series included:

- CNCS Orientation, Financial Management, Criminal History Checks
 - Member/Site Management, Financial Management Systems
- Program Start-up Grantee Panel: What I Wish I Knew in Year 1
 - Reasonable Accommodations Technical Assistance
- AmeriCorps Branding: Working Together to Tell Our Story
 - AmeriCorps Prohibited Activities
 - Program Continuity Planning
 - Member Training and Retention
 - Monitoring Members and Sites

Introductions



- ✓ *Name*
- ✓ *Agency*
- ✓ *Location*
- ✓ *Relationship with AmeriCorps*
- ✓ *Favorite summer sport?*

**Please take a moment to introduce yourself in the
Conversation box.**

Example

- ✓ *Barbara*
- ✓ *CNCS*
- ✓ *Washington, DC*
- ✓ *Long-term committed relationship
as an AmeriCorps staff member*
 - ✓ *Biking*

Today's Session



1. Sources of Requirements
2. Planning Elements and Recommendations
 - ✓ AmeriCorps Member Monitoring
 - ✓ Service Site Monitoring
3. Program Spotlights
4. Grantee Training Resources

Terms and Acronyms



Grant Terms and Conditions

Code of Federal Regulations (CFR)

Notice of Grant Award (NGA)

Operating Site

Portal

Prime Grantee

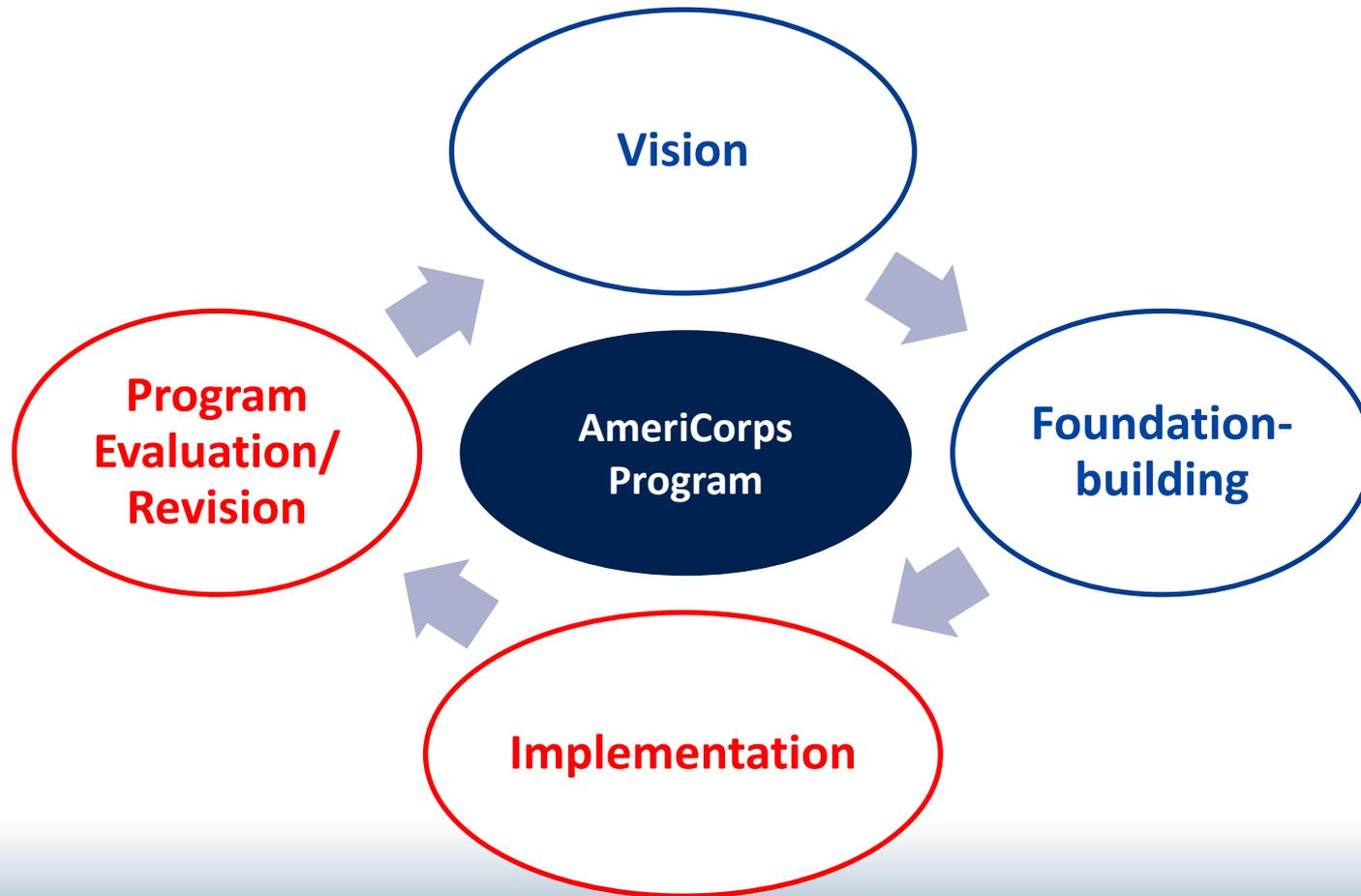
Service Site

Monitoring Defined



- *To observe and check the progress or quality of (something) over a period of time*
- *To keep under systematic review*

Cycle of AmeriCorps Program Development



Sources of Grantee Requirements

FY17 AmeriCorps State and National Notice of Funding Opportunity, p. 20:

Compliance and Accountability

- The organization will comply with AmeriCorps rules and regulations including those related to prohibited and unallowable activities at the grantee, subgrantee (if applicable), and service site locations.
- The applicant's organization, in implementation and management of its AmeriCorps program, will prevent and detect compliance issues.
- The applicant will hold subgrantees (if applicable) and service site locations accountable if instances of risk or noncompliance are identified.

Sources of Grantee Requirements

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.

Sources of Grantee Requirements

2017 AmeriCorps State Specific Terms and Conditions, various requirements, including this on p. 9:

Timekeeping

The recipient is required to ensure that time and attendance recordkeeping is conducted by the AmeriCorps member's supervisor. This time and attendance record is used to document member eligibility for in-service and post-service benefits. The recipient must have a timekeeping system that is compliant with 2 CFR § 200.430.

Another Way to See Monitoring



Monitoring Questions



- What is our program achieving?
- Are we operating within our approved grant and budget?
- Are we compliant with all grant requirements?
- Are members having meaningful service experiences?
- How can we improve?

Monitoring Plan WWWW

- 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 and detect fraud, waste, and abuse; enforce all federal rules; continuously improve program delivery; document results
- How? Methods depend on program design, risk, staff

Monitoring Plan Considerations



Monitoring Plan Considerations

- Program Design: location, number/slot types of members
- Risk: nature of service, type of beneficiaries/communities served
- Staff: number and job responsibilities of staff, level of experience

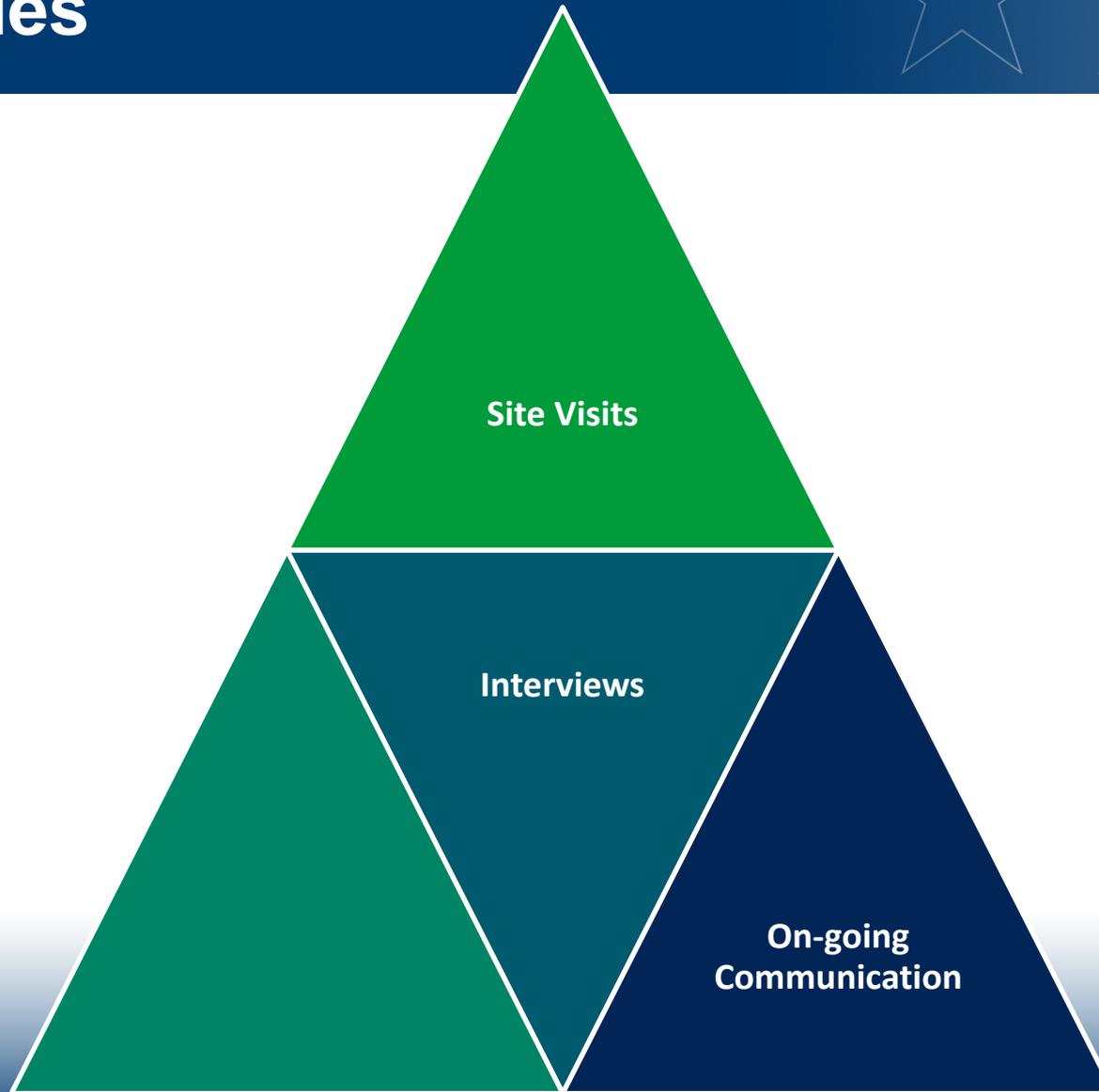
Elements of a Monitoring Plan

Indicator	Data Source(s)	Timing	Data Manager	Quality Control/ Verification

Elements of a Monitoring Plan--Example

Indicator	Data Source(s)	Timing	Data Managers	Quality Control/ Verification
Member enrollment	Portal	Annual	Program Manager	Evaluation Manager
Member service hours	Program tracking system	On-going	Program Manager	Evaluation Manager
Program output	Program instrument, site reports	Quarterly	Members Sites, Evaluation Manager	Board Monitoring Team, External Evaluation
Program outcome	Program instrument, site reports	Quarterly	Members, Sites, Evaluation Manager	Board Monitoring Team, External Evaluation

A Few Types of Monitoring Activities



What does your monitoring look like?

What types of monitoring activities do you use in your program?

Who conducts these activities?

**Please take a moment to answer in the
Conversation box.**

Recommendations for Strong Site Visits

- Create a detailed site visit schedule as part of overall monitoring plan
- Use a standard agenda for all types of visits
- Provide pre-work for visits and thorough post-visit reports
- Interview site staff, members, volunteers; use standard scripts for the interviews; take detailed notes and include this information in your site visit reports
- Train staff on how to conduct visits; debrief thoroughly; constantly build skills

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 Service Sites

Keep a close eye on:

- Member supervision – verify timesheets are signed and dated correctly
- 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



- ***Standard steps include:***
 - Document mistake, error, or violation
 - Provide correction
 - Notify CNCS if appropriate (required in case of violations of the prohibited activities)
 - Re-train staff and/or members to comply with requirements
 - Follow-up within a reasonable time period to confirm correction was implemented and adequate

CNCS Monitoring of AmeriCorps State and National Grantees

- Led by Program Officers
- Annual plan
- Activities include completion of the monitoring tool, site visits, training/technical assistance visits, desk reviews, progress report feedback, and on-going communication

CNCS Monitoring Tool

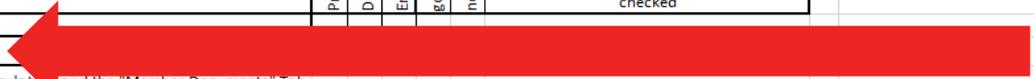


Compliant (y/n)		Initial Assessment	Type					
	N/A		Prevent	Detect	Enforce	good strategies	needs improvement	
		The Member Management section includes elements required for compliant systems, policies and processes related to member support, enrollment, recruitment and retention.						comments required if either "good strategies" or "needs improvement" is checked
Commissions and Directs:								
1		Verify member eligibility [45 CFR § 2522.200]						
		see the "Member Eligibility" tab for the regulation and the "Member Documents" Tab for a complete check list of required documents.						
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]						
		see "Criminal History" tab in spreadsheet						
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]						
		Ensures that members are aware of prohibited activities and that prohibited activities are not						

CNCS Monitoring Tool



Compliant (y/n)		Initial Assessment	Type		good strategies	needs improvement
			Prevent	Detect		
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Program Spotlight: Volunteer Maryland



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

Training Staff for Site Visits

- Staff manual contents included:
 - Job Descriptions
 - Communication Skills
 - Writing (note-taking and reporting)
 - Persuasion
 - Conflict Resolution
 - Program Data
 - Member and site demographics (current and past)
 - Program performance indicators (process and results)
 - Evaluation plan, instruments, schedule

Reality Check for Site Visits

- Scenarios:
 - Best case examples:
 - All scheduled attendees arrive on time
 - Discussion is positive and constructive
 - Communications are clear and cordial
 - Worst case:
 - The exact opposite

Volunteer Maryland Lessons Learned

- Check your assumptions about members, sites
 - Program fluency (goals, rules)
 - Program buy-in (national service, member development)
- Double check your math
 - Member timesheets
 - Reporting program data
- Invest in staff training to support monitoring
 - Site Visit Manual
 - Dress Rehearsal for First Time Site Visit Leads
 - Observation/Feedback for New Staff

Program Spotlight: Ysleta del Sur Pueblo – Target Tigua



Target Tigua Overview



- Location: El Paso County, Texas
 - Nation Building/Cultural Education
 - Financial Literacy
 - Environmental Stewardship
 - Volunteer Income Tax Assistance Program (VITA)
 - Entrepreneurial Education
- 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 program staff 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 staff 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 used to capture feedback from participants
- Self-assessment of program offerings (i.e., educational sessions)
- Monthly member development meetings provide the opportunity to capture additional member feedback

Site Monitoring



- Monitoring occurs at least once per program year for each program/host site.
- Monitoring tools are developed for each Target Tigua AmeriCorps program.
- Program examples:
 - Self-Monitoring Financial Literacy Sample
 - Site Feedback Letter

Target Tigua Program Experience

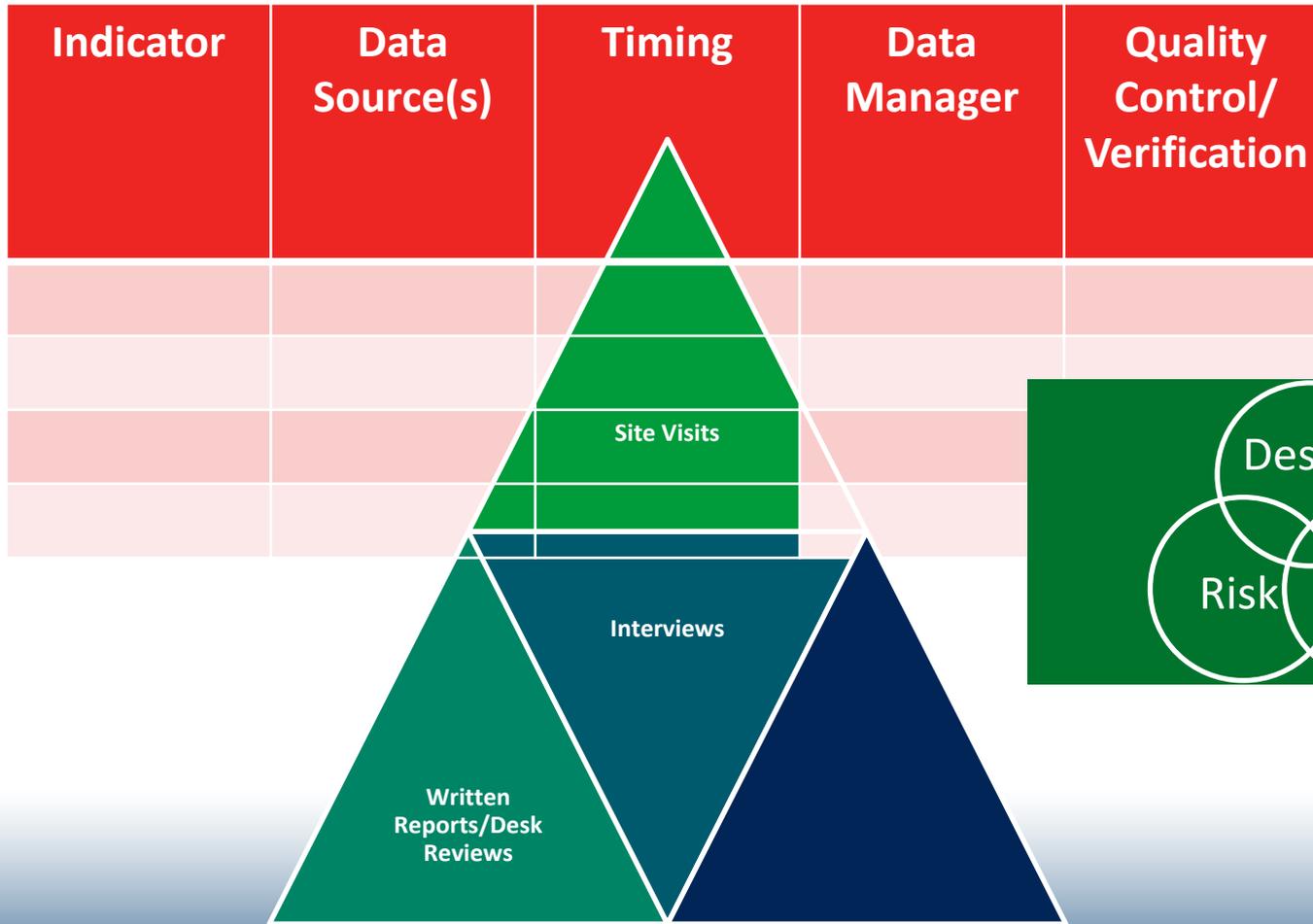
Lessons Learned:

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

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

Today's Focus



Monitoring AmeriCorps Members and Sites

- ***Key Points***

- Grantee requirements
- Monitoring benefits
- Elements of a member and site monitoring plan
- Program spotlights and lessons learned

What questions do you have?

***Please type a question or comment in the
Conversation box.***

Wrap Up for Today



- Resources at www.nationalservice.gov
 - Grant Terms and Conditions
 - National Service Knowledge Network: e-Courses on site and member management (www.nationalservice.gov/resources/online-courses)
- Next Session: July 14, 3:00 – 4:30 pm Eastern; Starting Strong – Orientation to the AmeriWorld (new programs and program staff)

Thank You!

