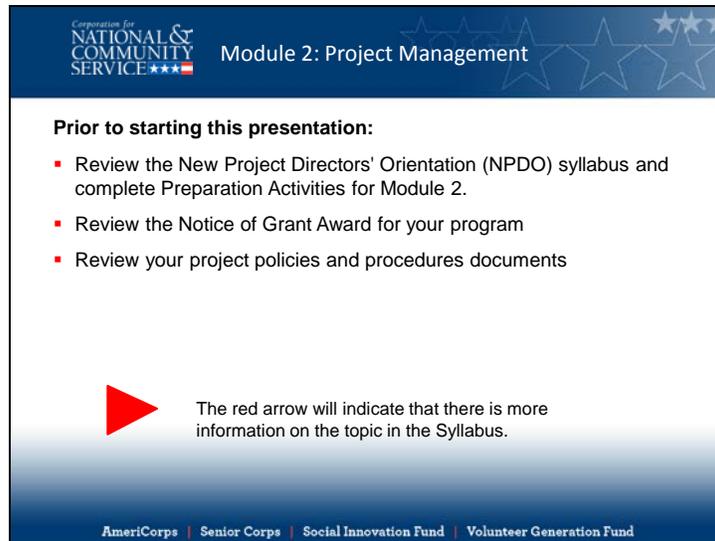


Slide 1



Welcome to Module 2 for RSVP: Volunteer and Station Management. If you have not reviewed the NPDO Overview presentation, Modules 1, and the NPDO Syllabus, please do so before you start this presentation

Slide 2



Corporation for
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Module 2: Project Management

Prior to starting this presentation:

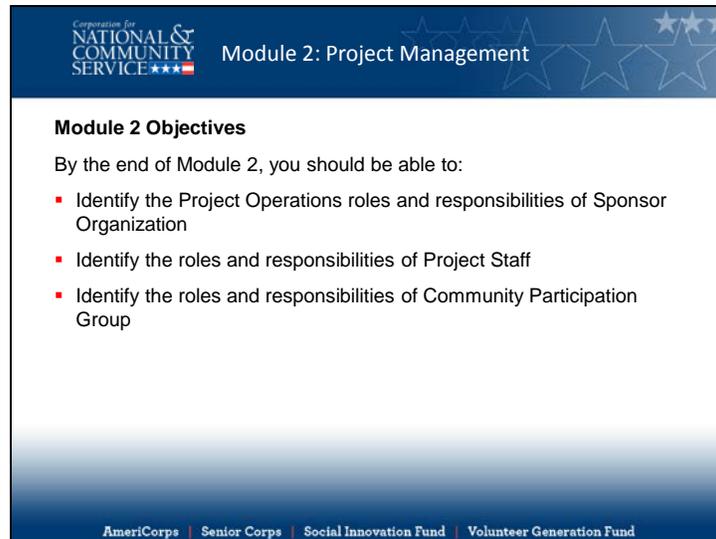
- Review the New Project Directors' Orientation (NPDO) syllabus and complete Preparation Activities for Module 2.
- Review the Notice of Grant Award for your program
- Review your project policies and procedures documents

 The red arrow will indicate that there is more information on the topic in the Syllabus.

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The New Project Directors' Orientation Syllabus provides the information you will need to complete the NPDO curriculum. Please complete the activities before starting this presentation. Reviewing your Notice of Grant Award, project policies and procedures documents, and completing the self assessment will make this presentation more relevant for you as you determine which aspects of your project may need more attention.

Slide 3



The slide features a dark blue header with the Corporation for National & Community Service logo on the left and the text 'Module 2: Project Management' on the right. The main content area is white with a blue gradient at the bottom. It lists three objectives for the end of Module 2.

Corporation for
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Module 2: Project Management

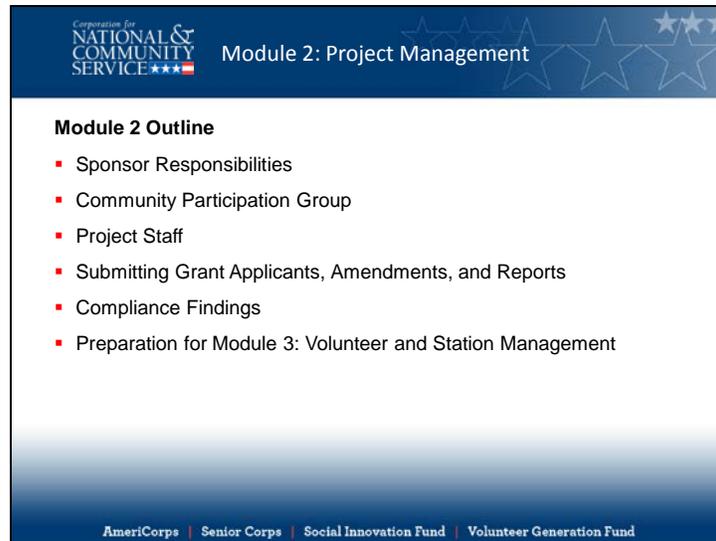
Module 2 Objectives

By the end of Module 2, you should be able to:

- Identify the Project Operations roles and responsibilities of Sponsor Organization
- Identify the roles and responsibilities of Project Staff
- Identify the roles and responsibilities of Community Participation Group

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Slide 4



The slide features a blue header with the Corporation for National & Community Service logo and the title 'Module 2: Project Management'. The main content area is white with a blue gradient at the bottom. It lists the 'Module 2 Outline' with six bullet points. The footer contains the text 'AmeriCorps | Senior Corps | Social Innovation Fund | Volunteer Generation Fund'.

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Module 2: Project Management

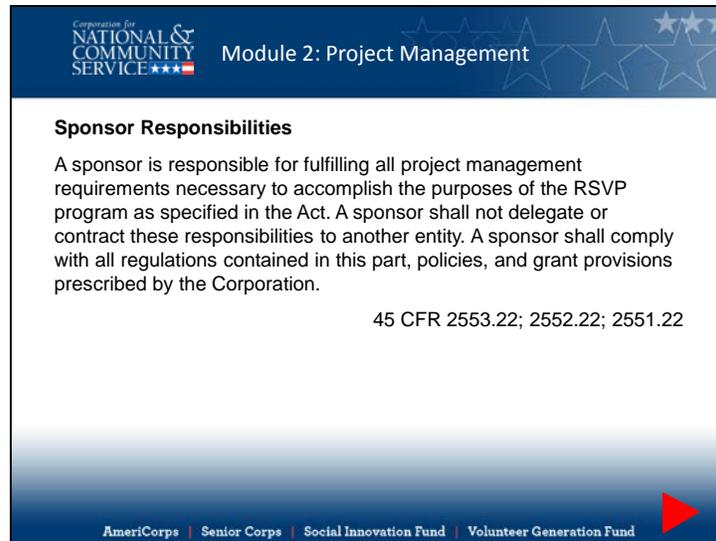
Module 2 Outline

- Sponsor Responsibilities
- Community Participation Group
- Project Staff
- Submitting Grant Applicants, Amendments, and Reports
- Compliance Findings
- Preparation for Module 3: Volunteer and Station Management

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In Module 2 we will introduce you to the roles and responsibilities that are key to compliant Project Management.

Slide 5



The slide features a blue header with the text "Corporation for NATIONAL & COMMUNITY SERVICE" and "Module 2: Project Management" next to a star graphic. The main content area is white with a blue gradient at the bottom. It contains the section title "Sponsor Responsibilities", a paragraph of text, and a reference to "45 CFR 2553.22; 2552.22; 2551.22". A red triangle points to the right at the bottom right corner. The footer lists "AmeriCorps | Senior Corps | Social Innovation Fund | Volunteer Generation Fund".

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Module 2: Project Management

Sponsor Responsibilities

A sponsor is responsible for fulfilling all project management requirements necessary to accomplish the purposes of the RSVP program as specified in the Act. A sponsor shall not delegate or contract these responsibilities to another entity. A sponsor shall comply with all regulations contained in this part, policies, and grant provisions prescribed by the Corporation.

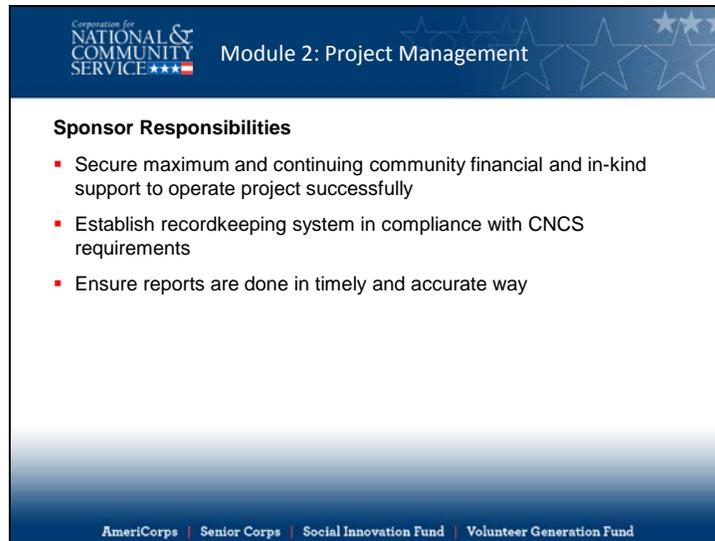
45 CFR 2553.22; 2552.22; 2551.22

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The Sponsor's Responsibilities are explained in the Senior Corps Regulations 45 CFR 2553.22; 2552.22; 2551.22. The regulation is the same for all three Senior Corps programs.

The Sponsoring Organization is the legal entity and is responsible for fulfilling all project management requirements. Typically the Sponsors' executive officer or board of directors delegate day-to-day project management responsibilities to a Project Director with oversight by the executive director or other supervisory staff.

Slide 6



The slide features a blue header with the Corporation for National & Community Service logo and the text "Module 2: Project Management". The main content area is white with a blue gradient at the bottom. It lists three sponsor responsibilities under the heading "Sponsor Responsibilities".

Corporation for NATIONAL & COMMUNITY SERVICE Module 2: Project Management

Sponsor Responsibilities

- Secure maximum and continuing community financial and in-kind support to operate project successfully
- Establish recordkeeping system in compliance with CNCS requirements
- Ensure reports are done in timely and accurate way

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Sections 45 CFR 2553.23; 2552.23; 2551.23 of the regulations give more details about the sponsors' responsibilities. The Sponsoring Organization is the legal entity and responsible for fulfilling all project management requirements. Typically the Sponsors' executive officer or board of directors delegate day-to-day project management responsibilities to a Project Director with oversight by the executive director or other supervisory staff.

Project directors should understand the program requirements and work with the sponsor staff to be sure the project is in compliance with all policies and regulations.

Slide 7



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Module 2: Project Management

Sponsor Responsibilities

- Ensure volunteer stations comply with applicable civil rights laws and regulations including providing reasonable accommodations
- Conduct Community Needs assessment
- Promote Senior Corps program in the community
- Comply with program regulations, the Notice of Grant Award, including the Certifications, Assurances and Terms and Conditions of the grant

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The Sponsoring Organization agrees to these requirements and the other terms and conditions in the Notice of Grant Award (NGA). It is important for Project Directors to understand what is included in the NGA.

Slide 8

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Module 2: Project Management

Notice of Grant Award

The NGA includes:

- Amount of Grant Award
- Reporting Requirements
- Terms of Acceptance
- Terms and Conditions
- Special Conditions

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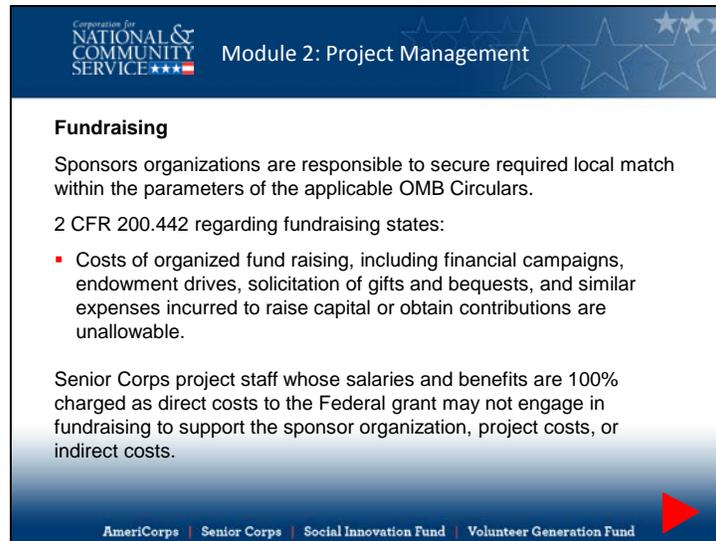
Notice of Grant Award, abbreviated, “NGA”, is the legal document issued by a grantor to notify the grantee that an award, based on a submitted proposal, has been made and that funds may be requested from the Payment Management System (“PMS”). A NGA is issued for the initial budget period and for each subsequent amendment and budget period in the approved three year project period

In the NGA there is a section called: “Terms of Acceptance” which states: “By accepting funds under this grant, the Grantee agrees to comply with all terms and conditions of the grant”. It is important to review the Terms and Conditions of the grant and confirm that your project and/or sponsor’s policies and procedures include all of the requirements you have agreed to comply with by accepting the award.

There is a section on the NGA called “Special Conditions.” Special conditions are additional criteria that your program officer or grants officer has deemed necessary but they do not want to delay the grant award for the organization to meet the condition. For example a “special condition” may instruct a grantee to submit a current A-133 Audit within a specific time frame. If the condition is not met the Grants Officer can put a hold on the grant funds. The details are specified in the Special Conditions section of the NGA. Not all NGA require special conditions.

Instructions for accessing your NGA are in the syllabus.

Slide 9



The slide features a blue header with the Corporation for National & Community Service logo and the text 'Module 2: Project Management'. The main content is on a white background with a blue gradient at the bottom. It includes a section header 'Fundraising', a paragraph about sponsor responsibilities, a reference to 2 CFR 200.442, a bulleted list of unallowable fundraising costs, and a paragraph about senior corps staff. A red arrow points to the right at the bottom right of the slide.

Fundraising

Sponsors organizations are responsible to secure required local match within the parameters of the applicable OMB Circulars.

2 CFR 200.442 regarding fundraising states:

- Costs of organized fund raising, including financial campaigns, endowment drives, solicitation of gifts and bequests, and similar expenses incurred to raise capital or obtain contributions are unallowable.

Senior Corps project staff whose salaries and benefits are 100% charged as direct costs to the Federal grant may not engage in fundraising to support the sponsor organization, project costs, or indirect costs.

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One of the Sponsor's responsibilities is to secure the local funding required by the program regulations.

The OMB circulars specifically preclude fundraising cost to be charged to grant either as direct costs or in-kind/match costs. When it is necessary for the project director to devote some time to fundraising it must be done in compliance with the OMB Circulars. This can be accomplished by reducing the time the project director charges to the grant's federal, or required nonfederal share, to reflect the time she actually spends on fund raising activities. A portion of the project director's time may be paid from fund other than federal funds, or required match-funds, to cover time spent in fundraising.

For example, a project director who needs to spend 5% of his or her time on fundraising activities would charge 95% of her time on the budget and Federal Financial Report (either as federal costs or required non-federal share) and the other 5% would be paid from excess non-federal funds, or other funds available to the sponsor. Project staff time spent on fund raising must be documented on staff timesheets with actual time spent, and documented after the fact.

Community Participation Groups can support Senior Corps projects in a variety of ways, including fundraising.

Slide 10



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Module 2: Project Management

Community Participation Group

Senior Corps grantees are required to secure community participation in local project operation by establishing an Advisory Council or a similar organizational structure.

Advisory Councils should help projects by:

- Raising funds and soliciting in-kind donations
- Determining priorities and needed improvements
- Conducting the annual assessment
- Assisting with volunteer recognition events
- Community outreach and marketing

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Senior Corps projects are community-based projects. There should be a real sense of local ownership and a spirit of partnership among the community, the sponsor, volunteer stations and volunteers. The sponsor determines how this participation shall be secured, consistent with the provisions of the program regulations (Sections 45 CFR 2553.24; 2552.24; 2551.24). If the sponsor has a board that meets the purposes and requires of Senior Corps that board can also serve as the Senior Corps Community Participation Group.

Community Participation Group or Advisory Councils can support Senior Corps projects in a variety of ways in addition to fundraising.

- . The Advisory Council membership should include community members who are:
 - Knowledgeable of the human and social needs of the community
 - Competent in the field of community service, volunteerism and issues related to service activities
 - Capable of helping the sponsor meet its administrative and program responsibilities including fund raising, publicity, and performance measures
 - Interested in and possess knowledge of the capability of older adults
 - Representative of the diversity of demographics of service area
 - Senior Corps Volunteers

An effective advisory group can expand the capacity of the sponsor and project staff. Be sure to check the syllabus for valuable resources for working with your advisory council

Next let's look at the role of the Senior Corps Project Director's role and responsibilities.

Slide 11

The slide features a dark blue header with the Corporation for National & Community Service logo on the left and the text 'Module 2: Project Management' on the right. The main content area is white with a blue gradient at the bottom. It contains a section titled 'Community Participation Group' followed by a paragraph and a bulleted list of five criteria. The footer of the slide lists four programs: AmeriCorps, Senior Corps, Social Innovation Fund, and Volunteer Generation Fund.

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Module 2: Project Management

Community Participation Group

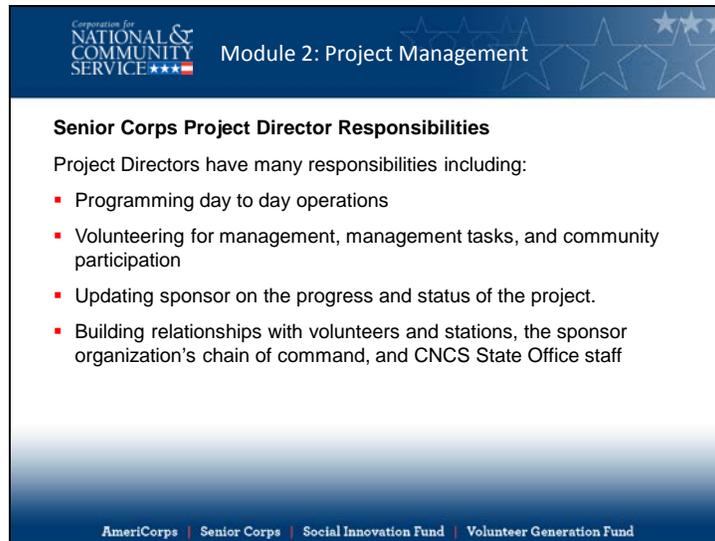
The Advisory Council membership should include members who are:

- Knowledgeable of the human and social needs of the community
- Competent in the field of community service, volunteerism and issues related to service activities
- Capable of helping the sponsor meet its administrative and program responsibilities including fund raising, publicity, and performance measures
- Interested in and possess knowledge of the capability of older adults
- Representative of the diversity of demographics of service area

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An effective advisory group can expand the capacity of the sponsor and project staff. Be sure to check the syllabus for valuable resources for working with your advisory council

Slide 12



The slide features a blue header with the Corporation for National & Community Service logo and the title 'Module 2: Project Management'. The main content is on a white background with a blue gradient footer. The footer contains the text: 'AmeriCorps | Senior Corps | Social Innovation Fund | Volunteer Generation Fund'.

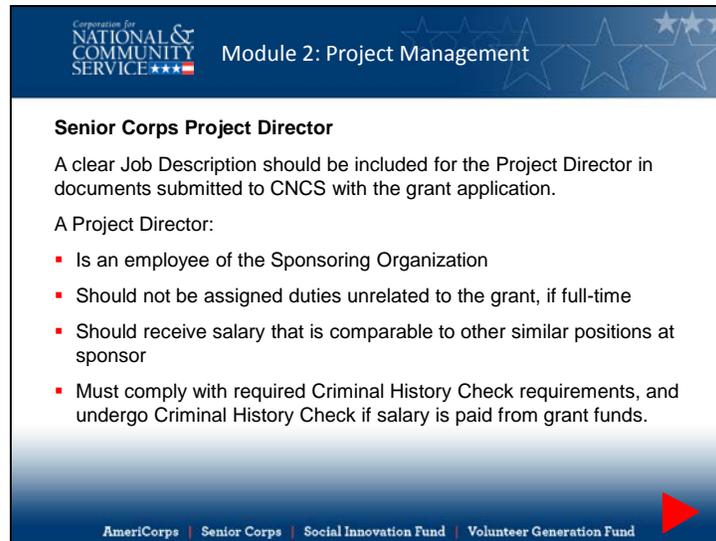
Senior Corps Project Director Responsibilities

Project Directors have many responsibilities including:

- Programming day to day operations
- Volunteering for management, management tasks, and community participation
- Updating sponsor on the progress and status of the project.
- Building relationships with volunteers and stations, the sponsor organization's chain of command, and CNCS State Office staff

Senior Corps Sponsors agree to provide levels of staffing to ensure the project's purposes and functions are accomplished. The Senior Corps regulation describes the relationship of the sponsor and project director.

The sponsor assigns responsibility for the project's daily management to the project director. A project director functions as a working project manager, actively involved with community organizations, Senior Corps volunteers, and volunteer stations. The project director serves as the representative of the sponsor. The Sponsor may delegate Project Directors the authority to sign and approve official project documentation, including project reports, memoranda of understanding. The sponsor may establish procedures for internal review and approval of project director actions, in accordance with its standard policies and procedure. 45 CFR 2551.25; 2552.25; 2553.25



The slide features a blue header with the logo for the Corporation for National & Community Service on the left and the text 'Module 2: Project Management' on the right. The main content area is white with a blue gradient background at the bottom. It contains the title 'Senior Corps Project Director', a paragraph about job descriptions, a sub-heading 'A Project Director:', and a bulleted list of requirements. A red triangle points to the right at the bottom right corner. The footer contains the text 'AmeriCorps | Senior Corps | Social Innovation Fund | Volunteer Generation Fund'.

Senior Corps Project Director

A clear Job Description should be included for the Project Director in documents submitted to CNCS with the grant application.

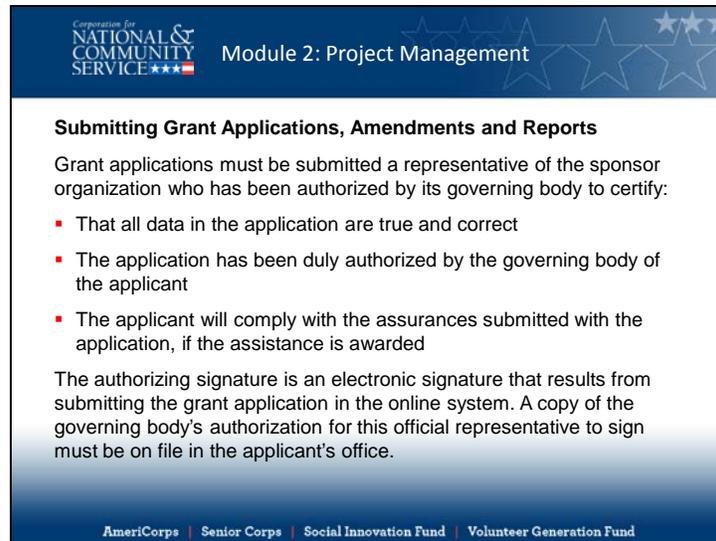
A Project Director:

- Is an employee of the Sponsoring Organization
- Should not be assigned duties unrelated to the grant, if full-time
- Should receive salary that is comparable to other similar positions at sponsor
- Must comply with required Criminal History Check requirements, and undergo Criminal History Check if salary is paid from grant funds.

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- Senior Corps project directors and other project staff are subject to the sponsoring organizations personnel policies and procedures and should be compensated at a level comparable to other similar staff positions.
- Project Directors are to work full time on the Senior Corps project unless approved by the CNCS State Office.
- Frequently other staff are paid from the Senior Corps grant including coordinators, accounting staff, or other sponsor staff who support the Senior Corps project.
- The Project Director's job description should specify the job responsibilities and authority delegated to the Project Director by the sponsor. A copy of the Project Director's job description must be submitted to CNCS with the grant application.
- Criminal History Checks are required for all staff who are paid with grant funds.

See the Syllabus for more information about Criminal History Checks.



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Submitting Grant Applications, Amendments and Reports

Grant applications must be submitted a representative of the sponsor organization who has been authorized by its governing body to certify:

- That all data in the application are true and correct
- The application has been duly authorized by the governing body of the applicant
- The applicant will comply with the assurances submitted with the application, if the assistance is awarded

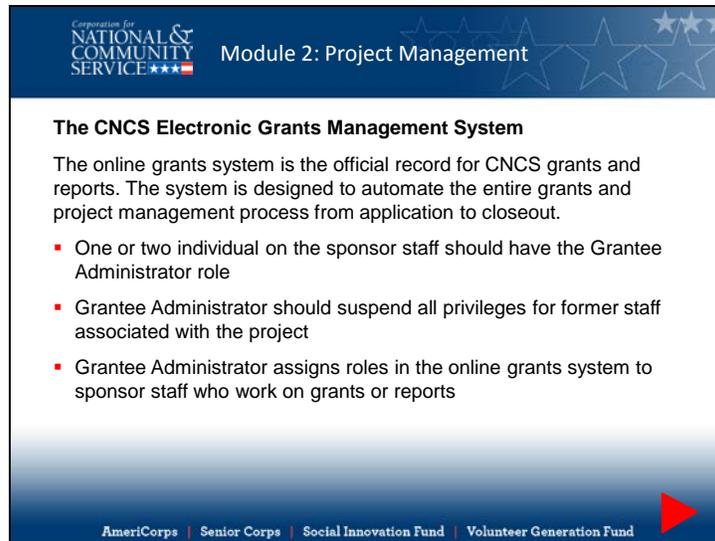
The authorizing signature is an electronic signature that results from submitting the grant application in the online system. A copy of the governing body's authorization for this official representative to sign must be on file in the applicant's office.

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Your sponsoring agency is the legal applicant for the Senior Corps grants. The authorizing representative electronically signs the Authorization, Assurances, and Certifications items by clicking "I Agree" in the CNCS electronic grants management system application. Usually, the authorized representative is the Executive Director or CEO of the sponsoring agency. The correct person must be logged in under his/her own account before pressing "I Agree" to apply their electronic signature to a grant application or amendment.

The authorized representative, in most cases, should not be the Project Director. Project Directors should only submit grants or reports if they meet qualifications described in this slide. If the sponsor's authorized representative chooses to delegate authority to the project director to submit reports or applications written policies and procedures should verify the roles delegated to the project director by the sponsor.

Slide 15



The slide features a blue header with the Corporation for National & Community Service logo and the text "Module 2: Project Management". The main content area is white with a blue gradient background at the bottom. It contains a section header "The CNCS Electronic Grants Management System", a paragraph describing the system, and a bulleted list of three points. A red triangle points to the right at the bottom right of the slide.

Corporation for NATIONAL & COMMUNITY SERVICE Module 2: Project Management

The CNCS Electronic Grants Management System

The online grants system is the official record for CNCS grants and reports. The system is designed to automate the entire grants and project management process from application to closeout.

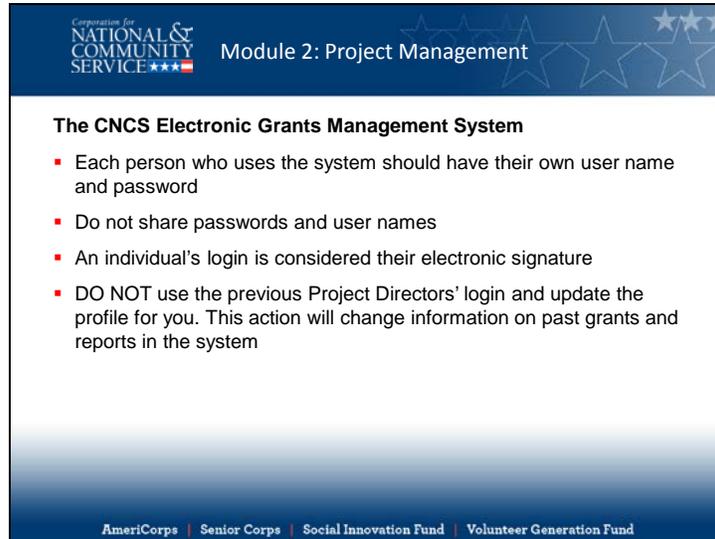
- One or two individual on the sponsor staff should have the Grantee Administrator role
- Grantee Administrator should suspend all privileges for former staff associated with the project
- Grantee Administrator assigns roles in the online grants system to sponsor staff who work on grants or reports

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It is important for Senior Corps project directors and sponsor staff to understand how to use the CNCS Electronic Grants Management System. This is the system of records for grants and reports submitted to CNCS.

Instructions for entering grant applications, reports, as well as printing documents from the online system can be found in the Syllabus.

Slide 16



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Module 2: Project Management

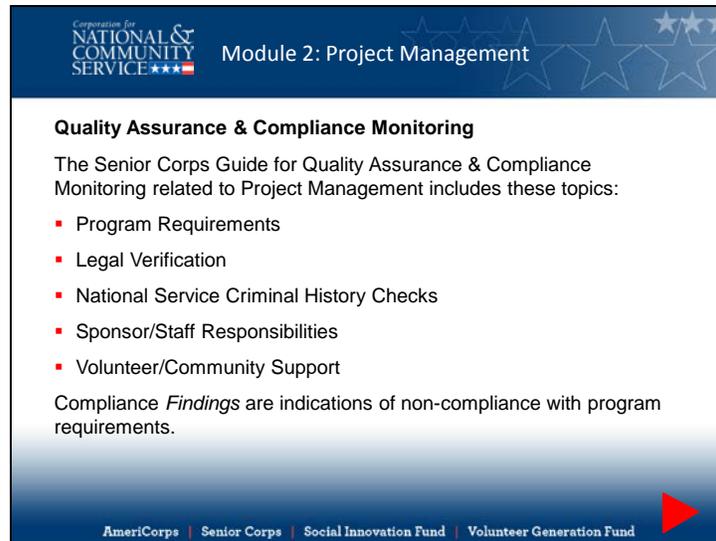
The CNCS Electronic Grants Management System

- Each person who uses the system should have their own user name and password
- Do not share passwords and user names
- An individual's login is considered their electronic signature
- DO NOT use the previous Project Directors' login and update the profile for you. This action will change information on past grants and reports in the system

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Use the information on these slides as a guide when setting up accounts for your project and organization.

Slide 17



The slide features a blue header with the Corporation for National & Community Service logo and the text "Module 2: Project Management". The main content is on a white background with a blue gradient at the bottom. It includes a section header, a paragraph, a bulleted list, another paragraph, and a footer with logos and a red triangle.

Quality Assurance & Compliance Monitoring

The Senior Corps Guide for Quality Assurance & Compliance Monitoring related to Project Management includes these topics:

- Program Requirements
- Legal Verification
- National Service Criminal History Checks
- Sponsor/Staff Responsibilities
- Volunteer/Community Support

Compliance *Findings* are indications of non-compliance with program requirements.

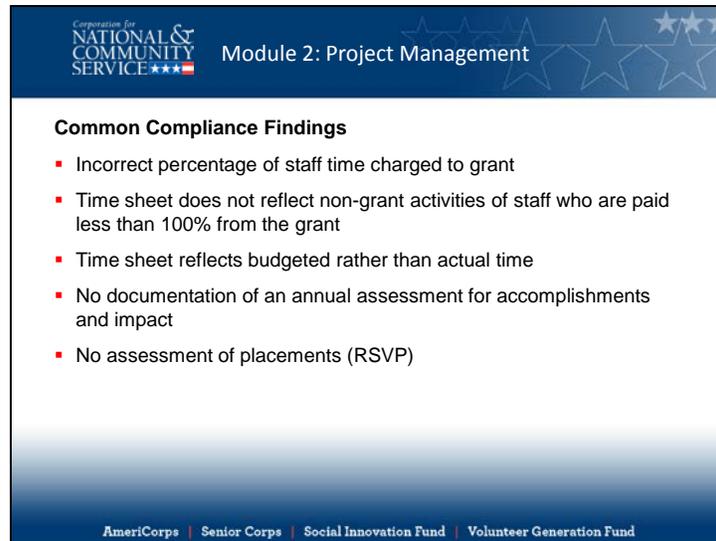
AmeriCorps | Senior Corps | Social Innovation Fund | Volunteer Generation Fund

Corporation Program Officers are required to conduct a Compliance Monitoring visit to each project site at minimum once every six years or when there are significant changes in the project or sponsor staff that warrant a visit. CNCS program officers are not auditors. Annual Monitoring Planning Assessments completed by the Program Officer and Grants Officer may indicate an on-site compliance visit or technical assistance visit be made in the interim years. Compliance Monitoring visits are conducted to test compliance with Senior Corps legal, regulatory, and policy requirements. Problems, or “findings,” that are identified during the compliance review must be addressed according to a plan that will be proposed by the program officer or grants officer.

In the New Project Directors' Orientation common compliance findings will be pointed out that correspond to the module topics. We hope that by discussing common mistakes here, New Project Directors will better understand the requirements and avoid these common compliance problems.

See the Syllabus for the Senior Corps Guide for Quality Assurance & Compliance Monitoring.

Slide 18



The slide features a blue header with the Corporation for National & Community Service logo and the text 'Module 2: Project Management'. The main content is a white box with a blue gradient background, containing a list of five common compliance findings. At the bottom of the slide, there is a blue footer with the text 'AmeriCorps | Senior Corps | Social Innovation Fund | Volunteer Generation Fund'.

Common Compliance Findings

- Incorrect percentage of staff time charged to grant
- Time sheet does not reflect non-grant activities of staff who are paid less than 100% from the grant
- Time sheet reflects budgeted rather than actual time
- No documentation of an annual assessment for accomplishments and impact
- No assessment of placements (RSVP)

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On this slide you see a list of common compliance findings related to Sponsor and Project Staff responsibilities.

Timesheets: It is important for new project directors to understand that their timesheets need to be prepared after the fact to accurately reflect actual time spent on the project. Timesheets will be discussed in more detail in Module 4: Reports, Budgets and Fiscal Management.

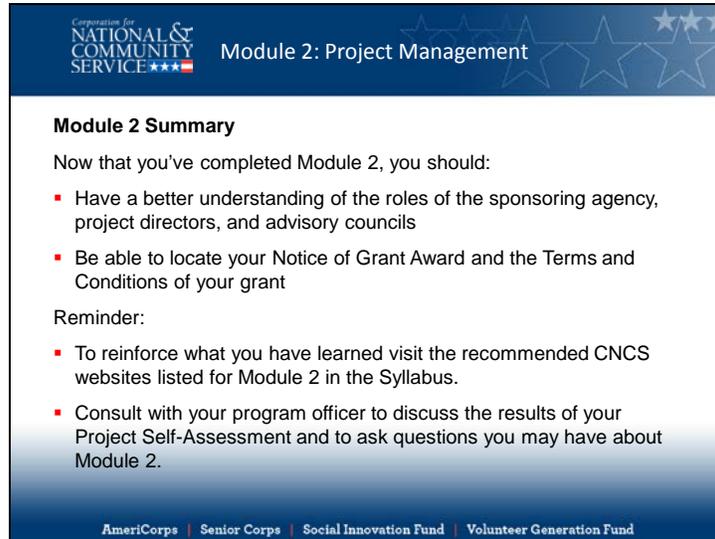
Annual Assessment of Accomplishments and Impact: An assessment of the accomplishments and impact of the project on the identified needs of the community should be conducted every year. The assessment may include client satisfaction surveys and the results of Performance Measurements outputs and outcomes. Projects are required to submit a copy of their Annual Assessment with their supporting documents for a year 2 or 3 grant continuation. The assessments should be strategic in nature and include an executive summary, a discussion of both achievements and challenges, as well as a discussion of what lies ahead for the project.

Annual Assessment of Placements: RSVP projects should conduct an annual assessment of placements to ensure the safety of the volunteers. Most projects include language in the MOU that states the station is responsible for providing for the safety of the volunteers. While inclusion of such language in the MOU does address the issue of ensuring volunteer safety and is an important element in an MOU, having such language does not fully address the question as to whether the sponsor actually assesses volunteer placements for safety. Use of on-site observations and/or annual satisfaction surveys coupled with language in the MOU is sufficient.

It is important for the project to indicate they have a process for ensuring the safety of its volunteers on an on-going basis.

Volunteer Stations will be discussed in more detail in Module 3: Volunteer Management.

Slide 19



The slide features a dark blue header with the Corporation for National & Community Service logo on the left and the text 'Module 2: Project Management' on the right. The main content area is white with a blue gradient background. It includes a section header 'Module 2 Summary', a paragraph 'Now that you've completed Module 2, you should:', and two bulleted lists. The first list contains two items about understanding roles and locating grant documents. The second list, under 'Reminder:', contains two items about visiting websites and consulting with program officers. The footer of the slide lists four programs: AmeriCorps, Senior Corps, Social Innovation Fund, and Volunteer Generation Fund.

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Module 2: Project Management

Module 2 Summary

Now that you've completed Module 2, you should:

- Have a better understanding of the roles of the sponsoring agency, project directors, and advisory councils
- Be able to locate your Notice of Grant Award and the Terms and Conditions of your grant

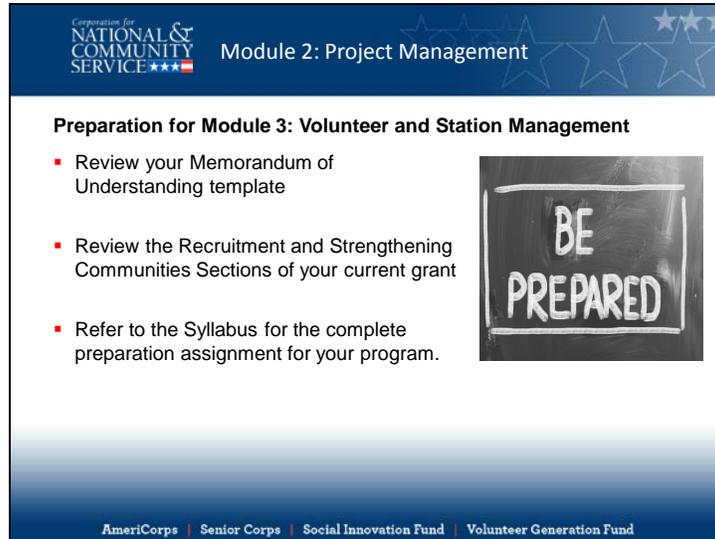
Reminder:

- To reinforce what you have learned visit the recommended CNCS websites listed for Module 2 in the Syllabus.
- Consult with your program officer to discuss the results of your Project Self-Assessment and to ask questions you may have about Module 2.

AmeriCorps | Senior Corps | Social Innovation Fund | Volunteer Generation Fund

If you have not completed the second Preparation Assignment, please take some time to complete it.

Slide 20



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Module 2: Project Management

Preparation for Module 3: Volunteer and Station Management

- Review your Memorandum of Understanding template
- Review the Recruitment and Strengthening Communities Sections of your current grant
- Refer to the Syllabus for the complete preparation assignment for your program.

BE
PREPARED

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Please complete the Preparation Activities listed in the Syllabus for Module 3 before you view the Module 3 presentation.

Slide 21



Congratulations! You have successfully completed the Module 2 Presentation of the New Project Directors' Orientation. Thank you for your participation.