New AmeriCorps Program Development – August 11, 2016

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Technology Check

ON THE PHONE:

The phone lines will be opened for Q&A after the presenter remarks.

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.

REPLAY:

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

New AmeriCorps Program Development Series

The New AmeriCorps Program Development Series is designed to help new CNCS grantees launch successful AmeriCorps programs. The 2016 series will include:

- Session 1 – July 21, 2016

CNCS Orientation, Financial Management, Criminal History Checks

- Session 2 – August 11, 2016

AmeriCorps Member and Site Management, Financial Management Systems

- Session 3 – September 22, 2016

Program Start-up and Development Grantee Panel at 2016 AmeriCorps State and National Symposium

- Session 4 – Fall, 2016

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

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Today's Agenda

- Site Management Overview: Barbara Ellen Reynolds

- Member Management: Heather McDonald

- Financial Management Systems: Bonnie Janicki

- Closing Remarks

Who is on the webinar today?

- **Please use the dialogue box to answer these questions:**

  - *What is your name?*

  - *What is the name of your AmeriCorps program or state commission?*

  - *Where are you?*

  - *What is your favorite Olympic sport?*

Example

- *Barbara*
  - *CNCS*
- *Washington, DC*
  - *Diving*

Presentation Target Audience

- AmeriCorps State and National Prime Grantees:

    - State Service Commissions (make subgrants to state AmeriCorps programs)
    - Tribal programs
    - National/multi-state programs

BARBARA ELLEN REYNOLDS
TRAINING SPECIALIST

- ✓ Works with AmeriCorps national and tribal programs and state commissions

- ✓ On CNCS staff since 2013

- ✓ Former commission director and AmeriCorps State director

- ✓ Baltimore Ravens fan

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

Example

CNCS Grantee: AmeriCorps Program HQ

4 Operating Sites in 4 Cities

16 Service Sites (4 at each Operating Site)

Today's Discussion
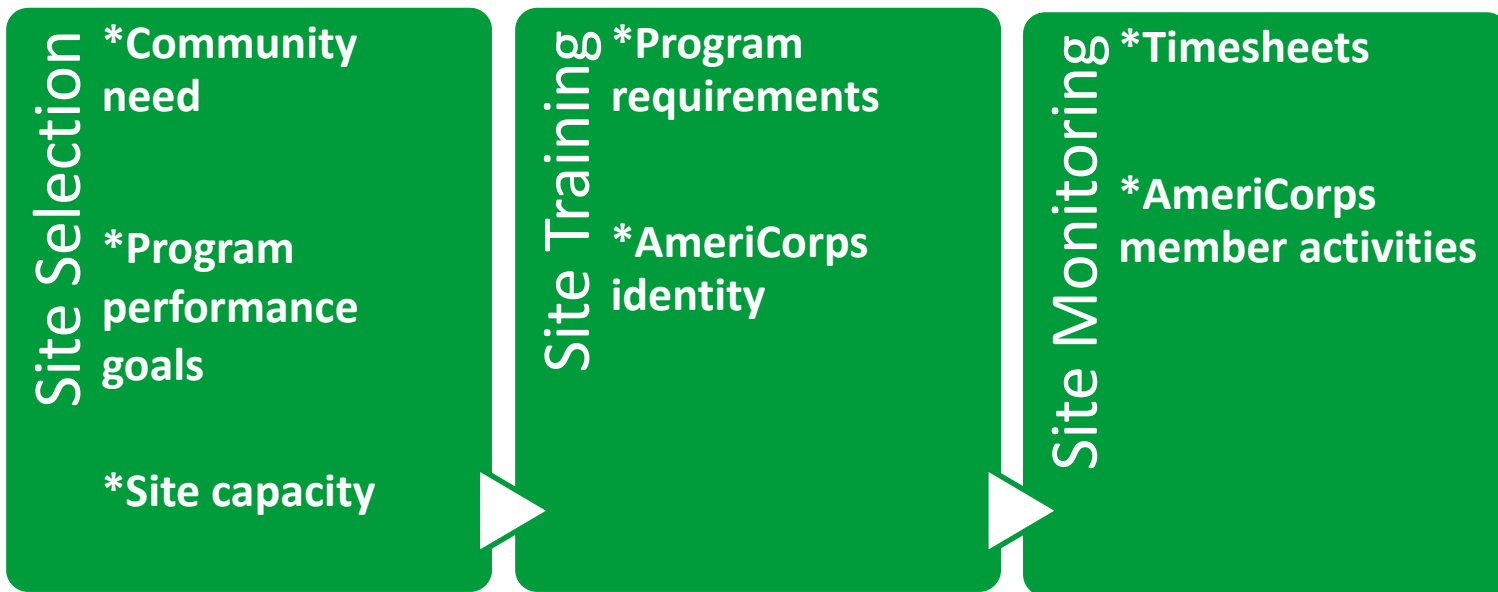
CNCS Grantee: AmeriCorps Program HQ

4 Operating Sites in 4 Cities

16 Service Sites (4 at each Operating Site)

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Site Management

Site Selection
*Community need

*Program performance goals

*Site capacity

Site Training
*Program requirements

*AmeriCorps identity

Site Monitoring
*Timesheets

*AmeriCorps member activities

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

Purpose of Site Agreement

✓Defines partnership and service expectations

✓Delineates responsibilities of each party

✓Establishes clear rules

✓Provides framework for evaluating success

✓Ensures support system for AmeriCorps members

Site Agreement Elements

Length of Agreement

Grantee Responsibilities

Site Supervisor

Site Responsibilities

Member Position Description

Policies and Regulations

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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**

✓ **Site agreement outline on the National Service Knowledge Network:**

www.nationalservice.gov/resources/americorps

CNCS
AmeriCorps State and National

HEATHER MCDONALD
PROGRAM OFFICER

- ✓ Works with AmeriCorps national and tribal programs and state commissions

- ✓ On CNCS staff since 2009

- ✓ Subject Matter Expert in CNCS Healthy Futures and representative for Let's Move! in Indian County

- ✓ Avid concert goer

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Member Management

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

  www.nationalservice.gov/build-your-capacity/grants/managing-americorps-grants

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

Managing AmeriCorps Grants Page

Cycle of Program Development

Member Management Flowchart

Position Development

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Recruitment and Selection

↓

Enrollment

↓

Training

↓

Supervision

↓

Performance Assessment

↓

Exit

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

Position Development

- Recruitment and Selection
- Enrollment
- Training
- Supervision
- Performance Assessment
- Exit

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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/americorps/member-position-descriptions

Member Service Agreement Contents

AmeriCorps Grant Terms and Conditions:

- 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 21 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-americorps-grants

✓ Check out examples of position descriptions, service agreements, and member file checklists on the Knowledge Network:
www.nationalservice.gov/resources/americorps

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.

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Grant Terms and Conditions

- Are <u>issued by CNCS</u> with the Notice of Grant Award

- Are the <u>guiding principles</u> for CNCS-funded grants and cooperative agreements

- Contain <u>program and financial</u> guidelines

- Are binding on the <u>grantee and subgrantee</u> in the same manner

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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

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

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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.

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What is in your financial house?

Characteristics of Organizations with Highly Effective Financial Management

- <u>Written and followed</u> policies and procedures

- <u>Qualified and trained</u> financial staff

- Effective <u>communications</u>

- Succession <u>planning and cross-training</u>

- Self-assessment and <u>continuous</u> improvement

- Active, knowledgeable, and informed <u>Board and finance committee</u>

Policies & Procedures

- Policies and procedures are a set of <u>written</u> 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"
- <u>All staff</u> must be familiar with these documents
- Documents must be kept <u>up-to-date</u>
- Documents should explain the <u>rationale</u> and include <u>principal transactions and completed forms</u>
- Documents must <u>incorporate</u> federal and CNCS grant regulations and terms and conditions

What do we document?

EVERYTHING!

All expenditures charged to the grant, INCLUDING:

➢ Total Match (called Grantee Share in eGrants budget)

➢ Cash and 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 <u>actual time spent on multiple projects</u>
- Timesheets are required

Key Elements of Financial Reporting

- Prepare all financial reports with information from the organization's <u>accounting system</u>

- <u>Review and reconcile</u> the information to ensure accuracy <u>prior</u> to report submission

- Ensure files have the proper <u>documentation to support</u> all information reported in financial reports

- Submit all reports <u>on time</u>

Financial Management Resources

✓**Terms and Conditions**

✓**Regulations**

www.nationalservice.gov/build-your-capacity/grants/managing-americorps-grants

✓**Trainings**

www.nationalservice.gov/resources/financial-management

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Q&A

- What questions do you have?

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

    - Program Development Recordings, Slides

- <u>Reminder</u>: Be sure to register for the ASN Symposium by September 2 (for prime grantees)

    - https://www.cvent.com/events/americorps-state-and-national-symposium/registration-486b72a3d0304c408c3d6c17da71befa.aspx

- Reminder: Grantee Panel at the Symposium – What I Wish I Knew in Year 1

    - September 22, 11:00 am – 12:30 pm, Alexandria, VA

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Thank You!