

November 12 Member Management Webinar Description of Audio

Welcome to AmeriCorps Member Management. Today's webinar is one in a series of presentations designed for new AmeriCorps program staff to provide guidance on AmeriCorps program requirements, best practices, and resources available to support program development.

Before we jump in to our content today, I want to take a few minutes and make sure you are accessing everything you need on this WebEx.

- To hear the audio, be sure to access the recording on the National Service Knowledge Network.
- Use the Chat Box to ask a question during the webinar; please select To Everyone on the drop down distribution list.
- The audio recording and PowerPoint slides of this presentation will be posted on the National Service Knowledge Network.

Use the Chat Box function to ask or answer questions at any time during the presentation. Take a minute and make sure this function is enabled on your screen and open during the WebEx: please open the Chat Box icon and type in a greeting for everyone on the WebEx.

On today's webinar, we will discuss these items:

- ASN Grantee Training Resources
- Member Service Agreements
- Orientation and Training
- Performance Assessments
- Take-aways and Resources to Support Your Work

I am the Training Specialist for grantee training and technical assistance in the AmeriCorps State and National unit at the Corporation for National and Community Service. In this role, I work with CNCS staff, contractors, and national service colleagues in the field to design and deliver resources that will help programs and commissions engage AmeriCorps members in great service.

I came on staff 2 years ago – before joining CNCS, I was the director of a state commission and an AmeriCorps state program in Maryland. Today, I'll draw on my own professional experiences with member management as well as the resources developed at CNCS over the years.

I want to take a couple of minutes to hear who's on the WebEx today. On the slide, you'll see the types of grantees and CNCS staff who may be joining us. Please take a minute and type in the name of your agency in the Chat Box on your screen.

Thank you; it looks like there is a mix of prime grantees as well as a couple of my CNCS colleagues on the call.

This is an overview of the types of grantee training and resources that I work on – and that exist to help you and your colleagues. Depending on your location, you may also have access to written materials, online trainings, and in-person events at your State Service Commission or parent organization.

Grantee Resources and Training:

- Written Materials/Guidance
 - State Commission Road Map
 - How to Complete Member Service Listings in the Member Portal (new!)
- Online Presentations
 - Today's webinar

- 2015 AmeriCorps State and National Symposium (all presentation online now!)
- In-person Meetings and Events
 - Symposium
 - Regional National Service Training Conferences

Here's a quick reminder of the ways in which you and your program can stay current on new resources and trainings that come up:

- National Service Knowledge Network – AmeriCorps State and National Resources Page
- Communications with your CNCS Program Officer and monthly TTA Updates from the ASN Training Specialist.

Here is a list of terms and acronyms that will be used frequently in this training. These should be familiar to you at this point, but I also know you have a lot of information and AmeriLingo coming at you from the Corporation all the time.

- AmeriCorps Grant Terms and Conditions are provided with the grant award at the start of each grant year.
- The Code of Federal Regulations or CFR or “regs” is a set of laws that govern AmeriCorps grant management.
- Your Notice of Grant Award or NGA or the Notice was provided in eGrants when your AmeriCorps grant was made last summer.
- An Operating Site is the location where an AmeriCorps program is housed and managed; members may or not be at the site.
- The Member or MyAmeriCorps Portal is found in eGrants, and it is where members are managed – from enrollment to exit.
- Prime Grantees are direct recipients of funds from CNCS. Tribal programs, national or multi-state programs, and State Service Commissions are prime grantees.
- State Service Commissions are governor-appointed entities that apply for and manage AmeriCorps State funds in each state and several US territories.

As you know, this is the AmeriCorps pledge. All AmeriCorps members serving in tribal programs, national or multi-state programs, and state-based programs take the pledge at the start of their terms of service; it is often administered as part of an induction ceremony by the AmeriCorps program or State Service Commission. The pledge conveys the overall motto of AmeriCorps, which is to get things done. It also conveys the expectation that AmeriCorps service is meant to be one year in a lifetime of service for the members.

AmeriCorps programs are charged with creating the necessary structures and environment where members may fulfill the commitments made in the pledge and have successful service experiences.

Several components of this responsibility are the subjects of our discussion today.

The Cycle of AmeriCorps Program Development is a general outline for how an AmeriCorps program may create the appropriate structure to help members be successful. This is a general program model – the way that it looks will vary tremendously around the country – tribal programs will design and deliver programs that meet their own communities' needs; multi-state programs will look very different in different parts of the country; and state programs will also be tailored to reflect the needs of their states and community members.

The program development cycle is an ongoing process, and member management tasks occur throughout it. This is also a good way to think about continuous improvement – as you continue to move through the cycle.

There are two important program responsibilities related to AmeriCorps members: the implementation of a comprehensive management plan that includes overall direction for members and specific help so that members will have a powerful service experience.

In plain language, these responsibilities mean AmeriCorps program staff are responsible for making the trains run on time (i.e., following the AmeriRules, meeting deadlines, etc.), and making the trip (i.e., the service experience) worthwhile.

These are the required components of an AmeriCorps member management plan:

- Service Assignment Development;
 - Member Recruitment and Selection;
 - Program Enrollment via the AmeriCorps Member Portal
 - Orientation Training;
 - Supervision;
 - Performance Assessment; and
 - Exit from the program via the AmeriCorps Member Portal
- During today's session, I'll focus on these aspects of the member management plan:
- Service Assignment Development;
 - Orientation and Training;
 - Performance Assessment, which includes member performance evaluations; and

The sources of guidance and rules for each of these areas and requirements for AmeriCorps program staff will be found in several different locations.

As with all aspects of AmeriCorps grant and program management, there are detailed and extensive requirements for AmeriCorps member management.

Programs receive instructions for member management in the annual grant terms and conditions, which are provided with the Notice of Grant Award at the start of the year;

There are also a variety of federal regulations that govern member management. These are outlined in the Code of Federal Regulations; and

AmeriCorps grantees receive additional guidance and instructions for member management from the Corporation for National and Community Service on a regular basis. This guidance is published in the annual Notice of Funding Opportunity, in updated FAQs, or in other materials found on the CNCS website, www.nationalservice.gov.

Here is an example of the type of specific guidance you find in your grant terms and conditions – and a reminder of the required pieces of the member service agreement, as detailed in the 2015 AmeriCorps grant terms and conditions.

At the top of the list of the required components of the member service agreement is the member position description. In my experience, the member position description is one of the single most useful tools for strong member and program management. In a relatively simple and brief document, you can represent your program's mission, the purpose and goals of the AmeriCorps program, member benefits, reporting requirements, and more.

These are the pieces of a strong member position description. As with the Cycle of AmeriCorps Program Development, each program will tailor the position description to best represent the member's service and profile, the community served, and the program goals.

Here is a short example of how a program may tailor an AmeriCorps member position description.

This example outlines the duties and service requirements for a member of a State Conservation Corps.

It is a full-time position, and the member's performance will be evaluated at the mid-term point and at the end of the term of service.

There is a great deal of variety – and creativity – with AmeriCorps member position titles in programs across the service network.

Here are several lessons learned from programs over the years as they've developed and strengthened their AmeriCorps member positions.

Do=best practices

- Use PDs for all aspects of member management: recruitment, training, evaluation, and more
- Keep regular schedule of PD review, updates, and improvement to be sure the descriptions represent the full range of activities required and the full scope of impact of the position and program

Do Not=avoid these common mistakes

- Do not use vague language in PDs such as including “etc.,” “and more,” or “other” in the assigned duties and responsibilities section
- Do not include prohibited activities in PDs (also...do not engage in prohibited activities!)

Unlike member service agreements, there aren't as many explicit components of member orientation and training. With its unique program design and member cadre, each program has the opportunity to design, deliver, and refine its own member training program.

These are the required items in the 2015 AmeriCorps Grant Terms and Conditions, page 8:

- Member orientation
- Prohibited activities

In addition, guidance on member orientation and training is infused throughout CNCS guidance for AmeriCorps grantees: from the annual NOFO to the regulations. All of this reflects our overall goal for member orientation and training: to equip AmeriCorps members with the necessary skills and knowledge to successfully complete their terms of service.

Here is a short example of the annual orientation and training plan for AmeriCorps members that I used at my AmeriCorps State program.

Section 1: Introduction to AmeriCorps: key players and history of national service

Section 2: AmeriCorps Program Overview: AmeriCorps member benefits, AmeriCorps rules and requirements, and agency, community, and partner relationships

Section 3: Skills Training: tailored to required duties in member's position description, includes required reporting, and communication skills (per the AmeriCorps program design)

This is an example of the annual orientation and training plan I used with my AmeriCorps State program. You can see that this is an outline for a 10 month, full-time AmeriCorps program and that specific training activities are broken down by a weekly schedule.

Note the schedule for the site orientation before members were recruited (does not apply to all programs), monthly trainings/every 4 weeks, a mid- year retreat that included extensive work on Life After AmeriCorps plans, a service year finale, and the engagement of program alumni, commission staff, and CNCS staff as trainers and presenters.

Here are several lessons learned from programs over the years as they've developed and strengthened their AmeriCorps member orientation and training plans.

Do=best practices

- Use skilled trainers and facilitators
- Engage members and site staff in training early and often
- Use O&T to strengthen the member experience

Do Not—avoid these common mistakes:

- Do not rely on only one method of delivery
- Do not reuse training content year after year

The member orientation and training plan is also a key element in ensuring a successful member service experience – through thoughtful and effective orientation and training, AmeriCorps programs can help members fulfill the AmeriCorps pledge to get things done and stay committed to service after the AmeriCorps term.

Specifically, programs can foster a connection to the AmeriCorps community and the program’s history, cultivate an environment that produces transformational service opportunities for the members, and help members design and realize their plans for life after their service terms.

Specifically, programs are encouraged to develop strategies to help their members make positive and lasting connections to their AmeriCorps program colleagues as well as to the national service field as a whole. This connection to the “AmeriWorld” can be especially important for members who are serving alone at a site or in a more isolated community. Reaching out to and connecting with AmeriCorps members in different programs or different parts of the country can help members sustain their energy throughout their terms of service.

Programs are also expected to provide opportunities for members to deepen their understanding of their communities, build their leadership skills, reflect on the meaning of their service, and learn from their experiences. AmeriCorps service is meant to provide significant professional and personal growth for the members—wherever those member and wherever they are in their lives. The way this looks will vary significantly from program to program and across the AmeriCorps network. For AmeriCorps programs that engage younger members, it may mean programs need to build in opportunities to learn for the first time about different types of community problems. For programs with older members, it may mean building in time for those members to share their life stories and connect them to their new roles with AmeriCorps.

And programs are expected to help members connect service to their life plans after their AmeriCorps service is over and become a part of the AmeriCorps alumni network. With nearly one million AmeriCorps alumni across the country at this point in time, this is an impressive potential labor force for businesses, nonprofits, schools, and more.

Here are several ways that AmeriCorps programs may connect their members and their programs to the broader national service field. Many programs include the history of national service and AmeriCorps in their member outreach and training. Since AmeriCorps is part of a rich tradition of service that includes VISTA, the Peace Corps, and the Civilian Conservation Corps, programs can help new AmeriCorps members understand how their service will build on this proud heritage.

Programs may also incorporate structured team-building activities throughout the service term to help members bond with their colleagues and build a positive esprit de corps. The best team-building activities occur frequently and reflect the program’s mission and the members’ interests and abilities. Programs may lead ropes courses or rafting trips for their members; or they may lead study circles and leadership institutes. Each program will have its own approach to team-building – one that will be appropriate for the types of members in the program, the community, and the nature of the service. This can be one of the most interesting and rewarding parts of serving in AmeriCorps – for both the members and the program staff.

And finally, programs often provide opportunities for connection with AmeriCorps members serving in other programs. Staff may work together to schedule events to allow AmeriCorps members to socialize and participate in service projects with members serving in different programs, regions, or states.

To help AmeriCorps members experience the full benefits of a term of national service, many programs tailor their training and supervision to best engage members in their communities.

They also incorporate a variety of reflection opportunities for different personality types or learning styles, such as journal writing, photography or video, and art projects. The reflection gives members a chance to take a break from the day-to-day responsibilities of service to the community and examine the impact of that service on the members themselves.

It can be especially important for program staff to help AmeriCorps members understand the impacts they are having – even when those impacts are not obvious. It is very common that AmeriCorps members will have a dip in their energy, their enthusiasm, or their commitment to service early in the service term. This is a danger zone of attrition for the program, and it's a good time to schedule a retreat, a special training or meeting, or a social event.

And to deepen the service experience, programs can help members tell their service stories by offering training on storytelling and public speaking. The effort it takes to create and deliver a powerful service story helps to seal the experience in the member's consciousness and to connect that member to the broader service community.

During my time as an AmeriCorps program director and training manager, reflection was far and away my favorite part of training and supporting our members. In my program, we used a variety of activities to encourage members to reflect on and learn from their service experience. These included: art, music ("AmeriCorps Idol"), poetry, dance (the interpretative service dance was the best!), story corps contests, and public speeches. Staff also participated in these activities, and they often led to great discussions at staff debriefs and meetings.

As the AmeriCorps service term comes to a close, programs are encouraged to build in opportunities to support the members as they move on in their lives. Helping members plan for and achieve their 'life after AmeriCorps' goals is one of the most important – and, again, extremely rewarding – parts of working with members.

Here are a few ways that programs may help members take their next steps:

- Program staff may sign members up with AmeriCorps Alums as part of the end of term paperwork. AmeriCorps Alums is a national association of alumni with chapters across the country. Members and alumni may connect online to share resources, job leads, and more – or they may get together for service projects or social events. Each alums chapter reflects the diversity and character of its community.
- Programs may schedule AmeriCorps alumni to talk about their lives and careers after AmeriCorps. AmeriCorps Alums is a great source of alumni for new programs.
- In addition, professional development and training on topics like where to find a second-year service opportunity, how to use the Segal education award, and how to describe AmeriCorps on a resume are great ways to help members with their next steps.
- And, if appropriate, program can always help build a talent pipeline for the service field; connect members to jobs in the field, at a service site, or at the program.

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The AmeriCorps requirements for member performance assessments are provided in the grant terms and conditions with specific requirements for members by their slot type. The instructions for the 2015-2016 grant year are provided on page 8 of the grant terms and conditions.

Here are several important considerations for member evaluations.

Why are AmeriCorps member evaluations required?

- Evaluations allow programs to monitor individual performance and ensure accomplishment of program goals
- Members must successfully complete their terms of service in order to receive the Segal education award

Who is evaluated?

- Programs must complete final evaluations for all members
- Programs must complete mid-term evaluations for all half-time and full-time members

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- Who is evaluated?
 - Programs must complete final evaluations for all members
 - Programs must complete mid-term evaluations for all half-time and full-time members
- What are programs required to evaluate?
 - Details on evaluation requirements are found in the regulations (45 CFR §2522.220c and 45 CFR §2526.15) and the grant provisions (section IV)
 - At a minimum, evaluations must include hours served and an assessment of the member's performance of duties; final evaluations must confirm "successful completion of the service term"
- How are member evaluations structured and recorded?
 - The overall structure will vary depending on program design and member service
 - Documentation of evaluations are maintained in the member files

Note the very important AmeriLingo here: the member's final evaluation confirms that she/he has "successfully completed the service term." This confirmation triggers the availability of the Segal education award.

It can be a challenge to keep all the different grant rules together and remember which rule applies to which piece of your member management plan or your program design. As you know, CNCS has a comprehensive tool that allows our staff to keep track of that guidance and review our grantees for compliance with it all.

- The monitoring tool is used by AmeriCorps State and National Program Officers each year to monitor program and state commission performance and compliance with the terms of AmeriCorps funding
- It captures both grantee progress and technical assistance needs
- The monitoring tool is completed during site visits or as part of desk reviews
- The tool contains 12 sections that represent the full implementation of your AmeriCorps program

This is a screenshot of the member management tab of the CNCS monitoring tool. You can see along the bottom of the screen, there are tabs for each of the items I mentioned a moment ago: results and accountability, data quality, member management, etc.

And this is the member documents tab of the monitoring tool. Here, you'll find a detailed member file checklist along with references to the source of requirements on all aspects of member management. Be sure to check with your CNCS Program Officer if you haven't seen this tool yet for your program. And be sure to look at this checklist to review your own member files.

The monitoring tool is also great because it gives you the exact location of the rules that govern each grant compliance issue. In the member documents tab, you'll find the citations from the federal regulations and the AmeriCorps grant terms and conditions that govern member evaluation requirements.

Here are several lessons learned from programs over the years as they've developed and strengthened their AmeriCorps member performance assessments.

Do=best practices

- Train sites on member evaluation process and format
- Provide members with all performance criteria

Do Not—avoid these common mistakes:

- Do not wait until the formal performance review to provide critical feedback
- Do not forget to document the completion of all member assessments

Here are two additional and important resources to support strong member management:

- *AmeriCorps Alums:* www.americorpsalums.org
- *America's Service Commissions:* <http://statecommissions.org>

I know that was quite a lot of information – What questions do you have at this time?

As a reminder, today's presentation is part of our annual TTA plan for AmeriCorps State and National grantees. The next AmeriCorps program development webinar will occur on December 10, 3:00 – 4:30 pm Eastern, and the topic will be fostering a positive AmeriCorps identity and AmeriCorps branding.

Thank you so much for your time today – and for your great work in our service world.