

4 ~ 6 Months Program Development & Management



Assess and Report Progress on Performance Measures

What does it mean to Assess and Report Progress on Performance Measures?

Once your program is in full swing, it is time to begin assessing program accomplishments. The idea is to chart progress toward goal accomplishment, determine the success of partnerships, and determine what is working and what needs improvement. Once you have done the assessment, you should report progress to all stakeholders.

Why should you Assess and Report Progress on Performance Measures?

Simple. You want to ensure that everyone is doing what they said they would do, members are experiencing a productive and successful service year, communities being served see value in the service the members are providing, and to ensure everything is on target. Most importantly, progress equates to a better chance of continued funding.

How do you do it?

✓	Identify staff person(s) responsible for collecting and analyzing data.
✓	Work with your host sites and other partners to identify a method for disseminating and collecting the performance measurement tools (surveys, interview protocols, etc.).
✓	Establish a system that collects program data on a monthly basis.
✓	Review any performance measurement data gathered from an external evaluator.
✓	Invite your host site partners, community partners, Corps members, and community members served to participate in completing your Customer Satisfaction Survey.
✓	If a site visit has been conducted, use that data also to assess performance measures.
✓	Implement a variety of performance measurement tools and use the data to evaluate program achievement and identify challenges. (See Resources)
✓	Revisit program goals with partners. Identify next steps and set targets.
✓	Report relevant information on the WBRs progress report.

Resources

<i>Resource</i>	<i>Description</i>	<i>Contact</i>
National Service Resource Center	<p><i>Great sample forms to tailor to your program.</i></p> <p>The NSRC supports and serves the programs of the Corporation for National and Community Service helping to promote volunteerism and community service activities throughout the USA.</p>	<p>http://www.nationalserviceresources.org/resources/sample_forms/</p> <p>XVI.B.2.PDF -> AmeriCorps Community Survey</p> <p>XVI.E.2.PDF -> AmeriCorps Program Director Survey</p> <p>VIC1.PDF -> AmeriCorps member mid-year self-evaluation form</p> <p>VID1.PDF -> Service site evaluation of AmeriCorps program and members</p> <p>VID2.PDF -> Site supervisor check-up for AmeriCorps</p>

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Program Development & Management



Refine Annual Calendar

What does it mean to refine your annual calendar?

At this point in the program cycle, you may have a better picture of the activities and events that impact program planning and operations. It's a perfect time to review and make adjustments to the calendar based on what you are learning and seeing.

Why should you refine your annual calendar?

By revisiting and updating the program calendar, you are taking into account the lessons learned during the first few months of the program. The result will be a stronger, more on-target program.

How do you do it?

✓	Pull together and review any performance measurement data you have about the program.
✓	Review performance measures and end outputs.
✓	Bring together relevant staff members to participate in the review and revision of the program calendar.
✓	Make sure that stakeholders who have activities that could impact the revised program calendar are invited to participate.
✓	Bring together your service site partners to review and revise the program calendar.
✓	Share the revised program calendar with all members of the organization.

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Staff Retreat

What is a Staff Retreat?

Take a breather, reconnect, reevaluate, chart the next six months—that's what a staff retreat is all about. Sometimes it may serve the dual purpose of a retreat and training workshop. It is primarily an occasion for all the staff to come together, usually away from the office, to review past activities and chart the goals and targets for the future.

Why should you conduct a Staff Retreat?

The process of starting up a program takes an incredible amount of energy. A mid-year staff retreat gives everyone a chance to step back and gain perspective on what has happened in the program. It's also a time to celebrate the successes and make adjustments where needed.

How do you do it?

✓	Conduct a needs assessment using interview and/or surveys to determine staff training needs and to identify key programmatic and management issues that need attention.
✓	Design the retreat using information gathered from the above needs assessment.
✓	Work with senior management and a steering committee that represents a cross-section of staff to create the agenda. Ensure the retreat schedule doesn't compete with other organizational priorities.
✓	Develop and communicate clear goals and objectives of the retreat. See Conducting an Effective Staff Retreat .
✓	Prioritize the issues you want the retreat to address.
✓	Include team building and networking activities so the staff can develop stronger linkages between each other.
✓	Ensure your budget can support the staff retreat.
✓	Identify an off-site space to conduct the retreat. The staff needs to be away from the office to really focus.
✓	Invite outside presenters/trainers to bring new learning to the organization. If you use an outside consultant, clearly communicate what you want to achieve.
✓	Follow through on the suggestions or recommendations that arise in the retreat.

Resources

Resource	Description	Contact
State Commission, Parent Organization, or other AmeriCorps groups.	Training and Technical Assistance Providers and Resource list. Use this to identify potential external trainers.	http://www.nationalservice.org/resources/training/index.html
Starting Strong: A Guide to Pre-Service Training	Good information about training implementation.	http://www.etr.org/nsrc/pdfs/startingstrong/starting.html

Frequently Asked Questions

What benefit is gained from holding a retreat off-site? *The biggest benefit is focus. Without the distraction of the everyday work pressures, staff members are able to focus and fully participate in the workshop.*

TOOLS
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Conducting an Effective Staff Retreat

Retreats are a valuable resource, but much of their potential can be wasted if they are planned ineffectively. Retreats should always be a forum for learning and working together that supports program activities in the field.

Consider the following when implementing a retreat:

- Define the desired outcome of the retreat.
- Determine who needs to attend in order to accomplish the desired outcome.
- Decide whether you will use a facilitator to help plan the agenda and manage the retreat.
- If you use a facilitator, decide whether s/he should be from outside the organization or inside the organization.
- Once you know how many people to invite, the type of space you need, etc., identify a facility that can accommodate your requirements.
- Visit the facility if you are not familiar with it to verify the accommodations.
- Develop an agenda for the meeting and determine whether you want the attendees to do any work prior to the retreat.
- Schedule some "fun" or "down" time for attendees to reflect and just enjoy being together.
- Hold retreats that last longer than a day at the beginning of the week. Participants will be much more focused if they have had the weekend to relax.
- Reconfirm details with the facility a few days before the retreat.
- Arrive early the day of the retreat to set up the room.
- Ask everyone to complete a Retreat Feedback Form at the end of the retreat.

Outcome or impact achieved:

Properly implemented retreats can create a setting that encourages communication and strengthens bonds as well as give you a better understanding of your participant/staff needs.

Source: Corporation for National Service. Handbook for Continuous Improvement, Tools & Practices, Participant/Staff Retreat, pp. 1-12.

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Community & Site Partnerships



Much of the success of your AmeriCorps program relies on the strength of your relationships with Service Sites and other community partners. Your role in these partnerships includes several elements. First, you want to ensure that your AmeriCorps members are engaged in productive service. Second, you want to determine whether on-site member development activities are taking place along with appropriate supervision and support. Third, you want to identify whether the Service Site is maintaining appropriate and accurate records. Finally, you want to determine what training or supports are needed by community partners to sustain the relationship. This section will prepare you to fulfill your role.

At the end of this section, you will be able to

- Plan and conduct a site monitoring visit to assess the strengths and needs of your subgrantees or service sites.
- Access and use a variety of tools and electronic resources to complete all activities in the Tools for Success section.

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Community & Site Partnerships



Site Monitoring Visit

What is a Site Monitoring Visit?

A site monitoring visit is a physical visit to an operating, placement, host, or service site to observe firsthand the work, the challenges, the successes, and the “big picture” of your partners who often may be some distance from your organization.

Why should you conduct a Site Monitoring Visit?

There are three key reasons to conduct site visits. First, you want to ensure that Corps members are receiving and providing the services the service site partner has agreed to provide. Second, a visit can provide needed support and guidance to sites that are struggling and need timely support. Third, as mentioned above, an in-person visit helps you get a feel for the experiences of this particular site, the members, and the community they serve.

How do you do it?

✓	Review the Four Types of Site Visits . Consider which type of site visit you want to complete.
✓	Send or provide service site partner with a copy of the site visit schedule. Review and implement Site Visit Procedures and the Checklist for an Ideal Site Visit tools.
✓	Provide a copy of the Desk Audit Form well in advance of the visit.
✓	Where appropriate use the Member Files Desk Audit tool as a checklist of what is supposed to be in the Corps member files.
✓	Review a random sampling of Corps member files. Physically check the contents of the file using the Member Files Desk Audit tool.
✓	Site visits are not punitive. Be open and transparent about the process. Conduct visits regularly or base your visits on a risk assessment of the organization.
✓	Review your completed Site Monitoring Form with the service site partner staff.
✓	Provide sites with Site Satisfaction and the AmeriCorps Site Satisfaction Survey tools to use to reflect on effective practices. These tools can be helpful in discussing areas of strength and improvement.
✓	Clarify and monitor follow-up actions (compliance issues, staff skill enhancement, etc.) to be taken on the part of the Service site.

Frequently Asked Questions

How many times should I visit a site during the program year? *Every site merits in-person attention. If your budget or staffing levels permit, at least one site visit per site is recommended. Some sites may need more visits and more technical assistance from you than other sites. In cases where sites need a great deal of support, also consider providing it through desk audits, e-mail, phone and fax communications in addition to the in-person visits.*

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Who, from my organization, should be involved in the site-monitoring visit? *Certainly someone familiar with the compliance and regulatory issues of the grant should make the on-site visits. Additionally, someone skilled in program management, financial management systems, supervision, and community service would be welcomed as a qualified monitor and provider of technical assistance.*

Who, from the Service Site, should be involved in the site-monitoring visit? *The person(s) responsible for site management, fiscal management, and direct supervision of the AmeriCorps members should be involved. Depending on the purpose and type of site visit it may be appropriate to hear from AmeriCorps members, senior management, board members, community members, or clients.*

Resources

Resource	Description	Contact
Handbook for Continuous Improvement, 1994	Site Visit Tools and Practices	www.nationalservicerresources.org/ pp. 1-5 and sample formats, 6-19

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Four Types of Site Visits

The National Readiness and Response Corps employs several types of programmatic site visits: Monitoring (includes fiscal aspects), Informational with limited monitoring (e.g. Pre-service orientation), Follow-up Visit, and Monitoring conducted by Operating Sites with multiple locations. Below is an explanation of each type.

1. Monitoring Visits

The NRRC Program staff will conduct a one to two day programmatic site visit at least once every two years. The purpose of this visit is to observe the operations of the site's program and to address any specific compliance or continuous quality improvement issues.

A typical site-monitoring visit consists of the following:

- An interview with the operating site supervisor;
- Interview(s) with the financial department and a review of financial systems in place;
- Interviews with NRRC members;
- Observation of program activities at local service sites;
- At minimum 50% randomly selected sample of member files;
- Meet with key State Commission, CNCS State Offices to discuss past and/or explore future opportunities for program coordination and collaboration;
- Wrap-up with the program coordinator and staff members; and
- Provide any training or technical assistance on programmatic, management, reporting, program development and / or financial issues as needed.

NRRC program staff will schedule site visits at least four weeks in advance of the visit. One week prior to the visit the host site supervisor will forward an agenda for the visit to the program staff.

Prior to the visit, NRRC program staff will complete a pre-site visit checklist. During the visit the NRRC program staff will review at minimum 50% randomly selected sample of member files.

Immediately after the visit, NRRC program staff will document the visit on the Site Visit Form. Within 15 working days following the visit, NRRC program staff will provide the grantee with a document detailing any compliance issues, quality improvement opportunities and required follow-up actions. Copies will be made available to chapter management and other pertinent staff. The NRRC program staff will continue to use the Site Visit Form to document when the corrective action plan was received and the date(s) the corrective action plan must be implemented.

2. Informational with limited monitoring

This type of site visit may be conducted if an NRRC program staff is in the general area of a local site and is considered to be more "informal", but not necessarily less important than a Monitoring Visit. These visits are generally less than one day. During these visits NRRC program staff will:

- Meet and talk with local site manager;
- Meet and talk with other appropriate staff (as available);
- Meet and talk with NRRC members (as available);
- Discuss concerns from the national level with site staff; and
- Provide training or technical assistance as needed.

If issues of concern or compliance do arise during the visit, the NRRC program staff will review them with the site manager at the time. Immediately after the visit, the NRRC program staff will document the visit on the Site Visit Form. Within 10 working days following the visit, the NRRC program staff will provide the grantee with a document detailing any compliance issues, quality improvement opportunities and required follow-up actions.

Copies will be provided to the chapter management. NRRC program staff will continue to use the Site Visit Form to document when the corrective action plan was received and the date(s) the corrective action plan must be implemented.

3. Follow-up Visit

These visits are only used in cases where the NRRC program staff determines it is necessary, based on previously documented issues and/or as requested by the Corporation for National and Community Service. These visits will follow the same guidelines as indicated by a Monitoring Visit and will specifically focus on compliance issues. They will occur within two months of a prior Site Visit.

Reasons for a Follow-up Visit include, but are not limited to:

- Site is not in compliance concerning financial matters (e.g. members are being paid on an hourly basis, no back up documentation for in-kind has been submitted);
- Findings of inadequate supervision on the part of the site supervisors;
- Staff transition at the chapter since the last Site Visit;
- Members have indicated that the site could be more supportive of members' needs;
- NRRC program staff determines that the site has had a history of consistent problems and questions the future of the program in an upcoming program year.

4. Other

These visits may occur in conjunction with a training event. Please refer to “Informational with Limited Monitoring”.

Also, this would include any site visits that are conducted by the Corporation for National and Community Service State Offices. NRRC and the local site are notified in advance of these visits and will work together to ensure a successful visit.

Service Site Satisfaction Survey

Each Service Site Supervisor should complete this Satisfaction Survey.

Service Site: _____ Date: _____
 Person Completing this Form: _____

Please read each of the statements below and mark the appropriate box.

How would you rate the Corps members ability in the following areas	Excellent	Very Good	Good	Needs Improvement	Don't Know
<u>Preparation</u> to complete the assigned work					
<u>Recruiting</u> Reading Partner volunteers					
<u>Placing</u> Reading Partner volunteers					
Relationship with Reading Partner <u>volunteers</u>					
Relationship with Reading Partner <u>schools</u> (primary contact)					
How <u>satisfied</u> are you with the <u>work</u> of the Corps members?	Extremely Satisfied	Very Satisfied	Satisfied	Mostly Unsatisfied	Not At All Satisfied
WHY?					
How significant was the work of the Corps members to your organization	Extremely Significant	Very Significant	Significant	Not Very Significant	Not At All Significant
WHY?					

Comments:

Return completed Form to _____ By _____ Thank You

LISC AmeriCorps Site Satisfaction Survey

Name of LISC Site Supervisor: _____ Position: _____

Name of Placement Site: _____ City: _____

Name of LISC AmeriCorps Member: _____ Date: _____

LISC AmeriCorps is asking our placement sites to evaluate our work as a national initiative. Please respond to the following questions regarding your experience with the program. Your comments will help us to strengthen our programs and services. Thank you for your time and continued support.

Place a check in the box or boxes next to the activities, programs and/or services provided by the LISC AmeriCorps Member at your site.

- | | |
|---|--|
| <input type="checkbox"/> Housing Counseling
<input type="checkbox"/> Youth Enrichment Programs
<input type="checkbox"/> Volunteer Recruitment
<input type="checkbox"/> Publishing Newsletters
<input type="checkbox"/> Workshops/Training
<input type="checkbox"/> Other | <input type="checkbox"/> Housing Development
<input type="checkbox"/> Tax Preparation Assistance/Job Training/Referral
<input type="checkbox"/> Work with Neighborhood Groups
<input type="checkbox"/> Distribution of Resource/Informational Materials
<input type="checkbox"/> Neighborhood Revitalization |
|---|--|

2. For how long have you been supervising the work of this member: _____ months.

3. Using the rating scale below, please rate the LISC AmeriCorps for each of the following items.

5 = Excellent	4 = Good	3 = Average	2 = Fair	1 = Poor	N/A=Not applicable
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ITEM	RATING	COMMENTS
1. How well did the objectives & suggested activities for the program fit the mission and scope of work of your organization?		
2. How clear were LISC AmeriCorps service objectives and the expectations of the program?		
3. How would you rate the Member's level of preparation for the placement and the service activities?		
4. How would you rate the training offered to members in helping them perform their service activities?		

5. How would you rate the benefit of monthly meetings to members?		
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5 = Excellent	4 = Good	3 = Average	2 = Fair	1 = Poor	N/A = Not applicable
ITEM		GRADE			
6. How would you rate the AmeriCorps member's ability to meet organizational needs?					
7. How would you rate the Member's ability to meet community needs?					
8. How would you rate the member's ability to recruit and train volunteers to take on the responsibility for initiating events or activities that are of benefit or interest to the community?					
9. How would you rate the organization's capacity to offer an increased level of services to the community as a result of the AmeriCorps member's placement?					
10. How well do you think the organization will be able to sustain the work begun by the member after the member has completed service?					
11. How well did LISC do in helping to solve any placement site or other member/program related issues you may have encountered?					
12. How would you rate the level and effectiveness of communication between LISC and your organization?					
13. How would you rate the level of support you received to manage the AmeriCorps member?					
14. How effective is the LISC AmeriCorps program at attracting and recruiting people into the community development field?					
15. Please rate your overall satisfaction with the LISC AmeriCorps program.					
Other:					
Other:					

Please describe any ways your organization benefited through the participation of an AmeriCorps member. Cite examples, wherever possible.

Please describe any ways the larger community benefited by having an AmeriCorps member placed at your organization:

Please describe any partnerships or collaborations formed with other organizations as a result of the AmeriCorps member's work.

Please tell us how you raise the match requirement for the member's placement.

Comments/suggestions on ways to strengthen the LISC AmeriCorps Program:

Site Visit Procedures

Timeline: Site visit should be conducted 2-4 months after start of program year.

One month prior to visit:	<ul style="list-style-type: none"> • Contact the program by phone to arrange mutually convenient date for the visit.
2-3 weeks prior to visit:	<ul style="list-style-type: none"> • Send written confirmation of site visit date and requirements to the Program Director. Confirmation should include a reminder about the length of time the visit will take, a brief agenda for the visit, and specific requests for time with staff members and Corps members. • A copy should be sent to the Commission members who have adopted the program.
2-5 days prior to visit:	<ul style="list-style-type: none"> • Review WBRS reports, rosters, member forms, and time logs, etc. Check service hours to identify that all information is entered and is up-to-date, review any reports that have been completed. • Review all recent site visit reports and follow-up. Note what the concerns were (if any) and the agreed upon improvements or corrective actions. • Survey Commission staff to determine if there are any other outstanding issues other than those identified above.
Day of the visit:	<ul style="list-style-type: none"> • Arrive promptly at the agreed upon time. • Wear AmeriCorps identification (pin, button, sticker, shirt). • Follow the agenda. Make every attempt to stay on schedule. • Document the site visit. Make notes on all key comments, questions answered, etc.
Following the visit:	<ul style="list-style-type: none"> • Within two working days, write a brief thank you note to all of those who participated in the visit. • Within two weeks, complete the formal written site visit report. • Send the site visit report along with a cover letter to the Program Director. The cover letter should indicate whether you require a response to the findings or concerns noted in the report. Usually such responses must be provided within 30 days of receipt of the letter. Identify if the program has requested T/TA. • Send a copy of the site visit report to the Commission member who has adopted the program.
Follow-up:	<ul style="list-style-type: none"> • If a written response is not received on the date requested (and an extension not granted), resend the site visit report to the next level of authority within the organization. The cover letter should indicated the overdue response and allow for an additional 2 weeks to provide the requested information. • If a written response is not received after the second request, notice should be sent to the certifying official (who signed the grant application) that reimbursements are being held pending receipt of the requested response.

Adapted from the Missouri Service Commission

Checklist for an Ideal Site Visit

Advance Arrangements Timeline:

- Confirm dates with program coordinator and send checklist (four weeks prior)
- Reserve plane ticket and rental car, if flying (four weeks prior)
- Develop itinerary with program coordinator (three weeks prior)
- Make appointments to meet with Lead Agency, if possible (two weeks prior)
- Make hotel reservations (two weeks prior)
- Draw up itemized budget and file “Request for Official Travel” form (two weeks prior)
- Confirm itinerary with coordinator and email to members and supervisors (one week prior)

Do Not Forget To Bring:

- Team Meeting Agenda
- Assessment and interview forms (member, supervisor, training, etc.)
- Operating Site Performance Measures
- Most recent member progress reports
- Analysis of Operating Site’s pre- and post-training questionnaires
- Site In-kind Reports and schedule of missing months
- Status of non-federal match payments
- Addresses and phone numbers of field offices and Lead Agency
- Uniform Order Form (or other items of interest for members)
- AmeriCorps buttons/stickers
- Camera, lodging itinerary, and maps
- Handbook and Policy and Procedure Manual
- Bring organization materials (brochures, pins, etc)

While on the Site Visit:

- Meet with program coordinator and complete Reporting Review and Supervisor Interview forms
- Meet with each member and complete Member Interview Form
- Meet with each site supervisor and complete Supervisor Interview Form
- Meet with each field office team to go over progress toward completing performance measures
- Complete Site Performance Measurement Form for each field office and for site as a whole
- Meet with Lead Agency

Upon Returning to Local Organization:

- Write thank you letter to Program Coordinator and attach Site Performance Measurement form
- Write thank you letters to site supervisors and attach Site Performance Measurement Forms
- Write thank you letters to members and attach Training Performance Measurement Forms with personalized notes
- Follow up on any action items revealed during the visit
- Write thank you letters to Lead Agency, if necessary

[on your organization's letterhead]

Desk Audit Tool

SECTION A: DOCUMENTATION

Below is a list of items designed to verify for LOCAL ORGANIZATION your site's compliance with key programmatic and operational requirements. Please send these to _____ by [insert deadline.]

- Copies of Program Coordinator and Site Supervisor Position Descriptions
- Copy of site's liability insurance policy
- Evidence that your site is a drug-free work place
- Evidence your site has a non-discrimination policy that includes providing reasonable accommodation to persons with disabilities
- Sample of travel reimbursement form used to pay for member or staff mileage
- Sample of log used by member to track _____
- Sample of member personal development plan

SECTION B: STATUS OF COMMITMENTS TO LOCAL ORGANIZATION

LOCAL ORGANIZATION has indicated the status of key commitments to the program. Please respond as necessary.

Payment of Participation Fee (i.e. cash match)

- Yes, paid in full. Thanks!
 Past Due

If past due indicate reason and expected date of transmission to LOCAL ORGANIZATION. Name who in the organization is responsible for the transmission if someone other than the Program Coordinator.

Completion of quarterly in-kind reports

- Up-to-date. Next deadline is [Insert upcoming report schedule]
 Past Due

If past due indicate reason and expected date of transmission to LOCAL ORGANIZATION. Name who in the organization is responsible for the transmission if someone other than the Program Coordinator.

List of any **PAST DUE** member enrollment or evaluation materials.

PLEASE NOTE THESE ITEMS ARE DUE AT THE TIME THE DESK AUDIT IS RETURNED.

- Enrollment Paperwork
 Pre-service Community Interviews

- _____ Mid-term evaluations of members
- _____ Add needed information

PLEASE REMEMBER, THE NEXT PROGRESS REPORT IS DUE

SECTION C: CONTINUOUS IMPROVEMENT AND SUSTAINABILITY

What State Commission events have you and your members attended or will attend this year?

Member Enrollment Commitment [Insert #]

Member Enrollment to-date [Insert #]

Please describe your plans to develop and retain currently enrolled members. What recruitment methods will you use beginning this fall for program year _____?

3. Have your members been or will they be involved in any local or national service activities in cooperation with other National Service sites (i.e. AmeriCorps, VISTA, RSVP)? If yes, which and how? If no, why not?

On a scale of 1 to 10, with 10 being “excellent,” 5 being “mediocre” and 0 being “awful,” rate the following:

- _____ Training and technical assistance provided by LOCAL ORGANIZATION
- _____ Success at recruiting and retaining quality AmeriCorps members
- _____ Member achievement of service goals
- _____ Value of AmeriCorps program to your operations
- _____ Value of AmeriCorps program to your members
- _____ Value of AmeriCorps program to your community
- _____ Overall level of satisfaction with the AmeriCorps program.

Please list any areas not covered above that you would like to discuss with LOCAL ORGANIZATION directly:

{Program Director} will call to arrange a phone appointment to discuss these areas as well as the rest of the document items with you. Thank you for your time and effort.

Member Files Desk Audit

National Readiness & Response Corps Desk Audit of Member Files

The goal of the “desk audit” is to determine if the local site is compliant with their documentation of member files. In addition, to verify hard copies for accuracy with information found on WBRS.

Local sites will be asked to forward a minimum of seven files throughout the year (random selection to be determined by NRRC program staff). NRRC program staff may ask for files from prior program years. In accordance with the AmeriCorps Provisions, sites should maintain all member files for up to three years after the close of the grant.

NRRC Operating Site Location: _____

Program Year: _____

Site Manager: _____

NRRC Member: _____

<i>Are the following items in the member's file?</i>	Yes	No	Comments/Files missing
Member application			
AmeriCorps enrollment form <ul style="list-style-type: none"> • Is it signed and dated by the member? (Will be approved by site supervisor via WBRs) • Was the form entered onto WBRs within 30 days of enrollment? • Were hard copies of the forms sent to the program headquarters by the date specified? 			
Member Agreement / Contract Is the site utilizing the NRRC Member Agreement of Participation? <ul style="list-style-type: none"> • Is it signed and dated by the member? • Is it signed and dated by the site manager? • If the member did not begin service on the start date, are the dates on the agreement adjusted? 			
Member Activity Summary Sheets (MASS)/Service Hour Logs <ul style="list-style-type: none"> • Do both the member and the site supervisor sign logs? • Are they up to date? • Do the hour logs segregate/track separately hours for service vs. hours for training? • Are the site supervisor's in kind time indicated? • Did the member complete the service reflection section? • Do the WBRs reports match what is on the hard copy version? • Were the WBRs reports uploaded by the appropriate date for Parent Org. review? 			
Documentation of citizenship/naturalization/resident alien status Primary documentation of status as a US citizen or national. <i>One of the following forms of documentation is acceptable and should be attached:</i> Documents to verify a member's status as a citizen or national include: <ul style="list-style-type: none"> • A birth certificate stating that they were born in one of the 50 states, DC, Puerto Rico, Guam, the US Virgin Islands, American Samoa, or the Northern Mariana islands; • A US passport, current and current • A report of birth abroad of a US Citizen (FS-240 issued by the State Department); • A certificate of birth-foreign service (FS-545 issued by the State Department); • A certification of report of birth (DS-1350 issued by the State Department); and • A certificate of naturalization (From N-560 or N-561 issued by the Immigration and Naturalization Service); Documentation to verify a member's status as a lawful permanent resident alien of the US include: <ul style="list-style-type: none"> • Permanent Resident Card (INS Form I-551); • Alien Registration Receipt Card (INS Form I-551); and • Departure Record (INS Form I-94) indicating that the INS has approved it as a temporary evidence of lawful admission for permanent residence; 			

<i>Are the following items in the member's file?</i>	Yes	No	Comments/Files missing
High school diploma/GED <ul style="list-style-type: none"> • Has member certified on the enrollment form that they have a high school diploma/GED? • Does the operating site have the <i>date</i> of when the member received their high school diploma or GED? 			
Documentation of Health Care Enrollment (if member is eligible) <ul style="list-style-type: none"> • If the member has exited, is there a termination letter on file stating when their AmeriCorps health care benefits ended? • Was the NRRC program headquarters notified within two weeks of member's exit so that the SRC roster is updated? • If there are any questions on healthcare coverage, please contact the program headquarters. 			
Disaster Services Human Resources Enrollment <ul style="list-style-type: none"> • Has the member been enrolled in the DSHR system on file? • Is there a copy of the member's DSHR enrollment form on file? • Is there a copy of the member's DSHR acceptance letter on file? • Is there a copy of the member's disaster assignment WPE on file? 			
Documentation of Child Care Enrollment (if member is eligible) <p><i>A member will <u>only</u> be considered eligible for child care benefits if</i></p> <ul style="list-style-type: none"> • <i>they are a full-time stipend member,</i> • <i>the member is the parent or legal guardian (or acting in loco parentis) for a child under the age of 13 who resides with the member,</i> • <i>the member has a family income that does not exceed the state's income eligibility guidelines for a family of the same size. At a maximum, family income can be no more than 75% of the state's median income; and</i> • <i>at the time of acceptance into the Program, member is not receiving childcare from another available source.</i> • If there are any questions on childcare coverage, please contact the program headquarters. 			
Tax documents <ul style="list-style-type: none"> • Is there a W-4 form to document tax withholdings? • If the program year is over, is there a W2 form? 			

<i>Are the following items in the member's file?</i>	Yes	No	Comments/Files missing
Member discipline documentation <ul style="list-style-type: none"> Was the member disciplined in accordance with the guidelines as indicated in their member agreement and program handbook? 			
Mid-term performance evaluation <ul style="list-style-type: none"> Was the mid-term Service Performance Review completed on time? 			
End of term performance evaluation <ul style="list-style-type: none"> Was a final Service Performance Review completed prior to member's out-processing? Is there a copy in member's file? 			
Member End of Term/Exit Form (if member has exited) <ul style="list-style-type: none"> Is it signed and dated by the member in the two places indicated? Is the supervisor signature concurrent with or after the member's? Is the form approved by the site supervisor on WBRs? Was the form submitted within 30 days on WBRs? 			
Documentation of Compelling Personal Circumstances (if applicable) <ul style="list-style-type: none"> If the member received a pro-rated ed-award (check the exit form), is there documentation of compelling personal circumstances that falls within the parameters identified in the AmeriCorps Provisions for the relevant program year? (WBRs will check this.) 			
Change of Status Form (if applicable) <ul style="list-style-type: none"> Do enrollment form and exit form for each individual reflect the same term of service? If not, is there an approved change of status form in the file that reflects the appropriate conversion? Was the conversion made within the first three months of the member's term? If not, is there evidence of grantee and Corporation approval? Was the form submitted to the Corporation within 30 days? <i>(Needs to be verified at CNS)</i> 			

4 ~ 6 Months

Member Development & Support



Member support and development is a process that lasts as long as each member's term of service. It begins in the 0 – 3 months program phase with the recruitment process, selection and support of Service Sites, and the AmeriCorps member training and orientation program.

At this stage in your program year, you should continue supporting and developing members through several important activities: a mid-term member evaluation, a staff and member retreat, and a continued focus on Life After AmeriCorps.

At the end of this section, you will be able to

- Find out how to build a service ethic and increase your member's knowledge of national service.
- Identify additional ways to support your members including building the esprit de corps of your teams.
- Conduct mid-term evaluations for your AmeriCorps members.
- Design and implement your Life After AmeriCorps curriculum for each member.
- Access and use a variety of tools and electronic resources to complete all activities in the Tools for Success section.

4 ~ 6 Months

Member Development & Support



Building Service Ethic and National Service Knowledge

What is service ethic and national service knowledge?

National service refers to any of the service programs affiliated with the Corporation for National Service. National service knowledge can include understanding the history, language, legislation and basic program information about the various service initiatives funded by the Corporation for National and Community Service, which includes AmeriCorps. Each of these programs promotes service as an American value (service ethic), an example of an active and educated citizenry.

Why should you build service ethic and national service knowledge?

Program directors and supervisors should be able to articulate the service ethic and the history of national service to their members and partners so that they, in turn, will understand their role in a national legacy of service. If you underscore and model the service ethic in your organization, you help members understand the magnitude of their commitment, develop a sense of pride in their membership and community and recruit others to get involved. Emphasizing the service ethic and history also helps to properly frame the member's term as a service experience, not a work experience.

How do you do it?

	✓ Implement opportunities for members to learn and apply concepts about national service covered during the Pre-service Orientation.
	✓ Create a National Service game to reinforce concepts and history.
	✓ Engage Corps members in reflective conversations and exercises to build understanding of the service ethic concept and its application in everyday society.

Frequently Asked Questions

How does one instill an ethic of service in another person? *You can't. Despite all of the activities, reflection and information you give, you will not be able to create an ethic of service in your members. They have to do it themselves, but the environment that a program creates fosters that development. Program directors should look for indicators of a service ethic when recruiting/screening members. Asking about one's previous volunteer experience is one way to assess whether an individual values service.*

Resources

<i>Resource</i>	<i>Description</i>	<i>Contact</i>
Next Steps: Life After AmeriCorps	This handbook helps members reflect on their experiences with AmeriCorps, their future plans and other opportunities to serve in effort to develop a lifelong service ethic.	Corporation for National and Community Service
Getting Started: A Guide for AmeriCorps Members	Formerly known as the AmeriCorps Member Handbook.	Corporation for National and Community Service

4 ~ 6 Months

Member Development & Support



Member Support

What is Member Support?

Member support refers to the combination of supervision, training and benefits provided to members during their term of service. Together, these components should provide a safe and structured environment in which members can grow and serve. Unlike a typical 'boss-employee' relationship, the Program Supervisor plays many different roles, including mentor, disciplinarian, teacher, guidance counselor, and 'people manager'. Individuals who enter the AmeriCorps program come from different cultural, educational and socioeconomic backgrounds. It is important for the Program Supervisor to recognize value and encourage the diversity present in an AmeriCorps team and engage members in appreciating and positively supporting one another. Policies, procedures, training and benefits can be used to support this effort.

Why should you be concerned with Member Support?

The success of a program is dependent on the activity of members. Member support helps to sustain members during their service term. Member support efforts reinforce retention, quality services and program compliance. Programs are required to provide member support to include GED training opportunities for members who do not have a high school diploma. If your program utilizes multiple site supervisors or team leaders it is important that they also receive training on and fully understand the expectations of their responsibilities as it relates to member support.

How do you do it?

✓	Continuously improve the quality of your program. You may find opportunities throughout the year to remind members about program expectations (always write these times down for future knowledge).
✓	Continue activities related to the Life After AmeriCorps component of your program and service skill development training.
✓	Implement a Corps member evaluation (required mid-year and end-of-year) process. Use the information gathered to provide additional training or support to members. Also use the data to inform program improvements.
✓	Complete a site visit to ensure AmeriCorps members have appropriate supervision and are participating in approved activities.
✓	Ensure members are receiving their benefits.
✓	Conduct team meetings on a consistent basis.
✓	Relay importance of member support components and role of site supervisors during site supervisor orientation and training.

4 ~ 6 Months

Member Development & Support



Resource

<i>Resource</i>	<i>Description</i>	<i>Contact</i>
Stages of Group Development for AmeriCorps and Other National Service Programs	Check out this resource for information and support on guiding the progression of your Corps members.	www.nationalserviceresources.org/

4 ~ 6 Months

Member Development & Support



Building Esprit de Corps

What is *Esprit de Corps*?

Esprit de corps literally means group spirit. It is a feeling that develops over time when people learn to work effectively as a team toward a common goal. *Esprit de Corps* is an integral part of the AmeriCorps experience.

Why should you build *Esprit de Corps*?

Esprit de Corps fosters team success which in turn promotes member retention and development.

How do you do it?

✓	Learn to recognize the stages of team development (forming, storming, norming, performing, and adjourning); understand the role that supervisors may play in helping the team move through the stages toward eventually becoming a “high performing team”.
✓	Incorporate icebreakers to increase member interactions.
✓	Implement experiential activities as a way to begin to develop teams in a controlled environment. Experiential activities are fun, educational and challenging activities that affect people on several levels of learning (cognitive, physical, emotional, social and even spiritual).
✓	Make sure that if teamwork is an important part of the program, it is reflected in member performance evaluations, site supervisor development, orientation, etc.
✓	Celebrate small successes along the way. Include recognition of individual and team accomplishments. Reward the entire team for team accomplishments.
✓	Focus on the goals not the obstacles.
✓	Establish regular effective team meetings. Rotate AmeriCorps members’ responsibility for facilitating meetings.

Frequently Asked Questions

How can I ensure our teambuilding activities involve more than just fun and games? *When leading experiential team building activities it is essential to reflect on and discuss the “experience” be it a game, puzzle, physical challenge or problem to solve. It is very easy to get caught up in the fun, physical, and/or competitive aspects of team building exercises. Immediately after the exercises, ask participants to talk about the experience, how they felt about it, see how it is similar to “real life”. Help them draw out and apply the lessons learned to their community service or their lives after AmeriCorps. Manage the process and the energy, but don’t over-control the exercise; in order for teambuilding to be effective, you must let the natural course of emotions and behavior flow.*

4 ~ 6 Months

Member Development & Support



Resources

<i>Resource</i>	<i>Description</i>	<i>Contact</i>
Starting Strong: Training Topics and Activities	AmeriCorps Affiliation and Teambuilding chapter provides instructions and preparation needs for numerous team building activities.	www.nationalservicerresources.org/

4 ~ 6 Months Member Development & Support



Mid-term Member Evaluation

What is a Mid-term Member Evaluation?

Member evaluations are a formal assessment of a member's service performance. It should include a review of the elements of the program that ensure its success. Member evaluations, at a minimum, should focus on whether the member has completed the required number of hours; whether the member has satisfactorily completed assignments; and whether the member has met other performance criteria that were clearly communicated at the beginning of the term of service. Member evaluation provides the Program Coordinator and the member with a report of how the member is developing in the program. This evaluation should be considered a 'formal process' and should be documented and placed in the member's file. There are several different models for evaluation that can be implemented as a whole or in parts that are explained below.

Why should you conduct Mid-term Member Evaluations?

As a condition of the grant, a program must conduct and keep a record of at least a mid-term and end-of-term written evaluation of each member's performance. In addition, member evaluations provide an opportunity for improvement. Program Coordinators can assist AmeriCorps members in reaching their potential through continuous quality improvement, also known as evaluation. An evaluation's goal is not to find out what is 'wrong', but rather what is going well and what can 'be improved'. The evaluation can be beneficial if it is reciprocal—that is, the member should be invited to evaluate **your** performance and/or the performance of their **site supervisor** as it relates to the member's service role.

How do you do it?

	<ul style="list-style-type: none"> ✓ Find out how evaluation is conducted currently in the organization. Once again, the human resources staff may be able to help on this subject.
	<ul style="list-style-type: none"> ✓ Remember to ask yourself: "What do I need to know about the member's experience to make the program more effective?" List your needs and then find suitable evaluation models and tools to use. See a sample Member Evaluation tool.
	<ul style="list-style-type: none"> ✓ Evaluation works well when it is conducted at several different levels. Consider who is being evaluated and who is completing the evaluation when you design your system, and remember you can always improve the system throughout your experience.

Frequently Asked Questions

When should I conduct member evaluations? *AmeriCorps members must be evaluated at least mid-way through their service term and at the end.*

Resources

Resource	Description	Contact
National Service Resource Center	Search on member evaluation for sample tools.	www.nationalserviceresources.org/

4 ~ 6 Months

Member Development & Support



Life After AmeriCorps

What is Life After AmeriCorps?

Life After AmeriCorps is the phrase used to describe the intentional developmental efforts used to help corps members transition from the AmeriCorps experience to the next steps along their life path. Your job is to guide the members through this transition and help them identify opportunities to incorporate their service experience into their next steps. Life After AmeriCorps development is achieved through training, networking, identifying future education and career opportunities, and counseling.

Why should you be concerned with Life After AmeriCorps?

The Life After AmeriCorps aspects of a program help to develop your corps and therefore improve your program's quality, credibility and benefit to the community. It is a required component of all AmeriCorps programs: Because AmeriCorps members come from diverse cultural, educational and socioeconomic backgrounds they also come with many different aspirations. You may find yourself with a team that has members who want to go back to school for post-baccalaureate degrees, members who want to advance in the local community career setting they are in, members who want to attend the local community college and members who are unsure of what they want to do. Your guidance and linking to resources will assist these individuals to make concrete, informed decisions on what direction they want to move in life and how service can be an integral part of it.

How do you do it?

✓	Guide members in developing resumes and cover letters outlining their AmeriCorps experience and past professional or volunteer experiences.
✓	Guide members in identifying what they would like to do in the future.
✓	Provide members opportunities to design and implement trainings and other skill development activities.
✓	Create a library of information about colleges, universities, and technical schools. Make sure all members know how to use the Internet to search for information, access bulletin boards, participate in chat rooms relevant to their future job interests, and so forth.
✓	Make information about the Education Award available to members.
✓	Identify individuals in the organization and the community that you feel may be good mentors or speakers on career and education paths of high interest to members. Create ways for members to connect (more than once) with these valuable resources. Do this early in the program!
✓	Invite guest speakers to talk about career opportunities.
✓	Be aware of the diversity of your Corps and ensure that activities are appropriate for all. The "Life After AmeriCorps" needs of someone without a high school diploma will differ from a college graduate similarly a 22-year old will differ from a 50-year old.

4 ~ 6 Months

Member Development & Support



Frequently Asked Questions

When should I start planning and doing Life After AmeriCorps activities? *Ideally, you should pass out the **Next Steps** book the first day of the Pre-Service Orientation. Encourage members to start looking through the book and thinking about how their community service may relate to and impact on their future lives and livelihoods.*

My members have many different goals and aspirations; how do I schedule training and/or speakers for such a diverse group without boring some of them or losing their attention?

Unlike normal member training that all members must attend, you may want to offer a variety of Life After AmeriCorps activities and make some of them optional or elective. This way, members can sign up for the activities that are of greatest interest to them and pass on others. In addition to providing a series of talks on career opportunities, also explore linking members to outside ‘mentors’ in career areas that are attractive to them. Arrange for them to spend a half-day “shadowing” a mentor or interviewing 2-3 people in a particular profession. These sorts of activities will provide members with a realistic (vs. idealistic) understanding of their particular profession or technical area of interest. You may also attempt to use members in trainings as panelists on topics like the college experience or as facilitators, so that they can take an active role in the development of other corps members.

Resources

Resource	Description	Contact
National Service Resource Center	Contains a number of Life After AmeriCorps resources.	www.nationalservicerresources.org/

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Sample Member Evaluation

Name: _____

Date of Evaluation: _____

Dates of Service: Start: _____ Expected Completion: _____

Operating Site: _____

Program Coordinator: _____

Please list type(s) of service: _____

The criteria listed below reflect “an effective and committed service member”. These behaviors or characteristics were identified based on experiences and perspectives from members, program coordinators, and community partners. Using the scale provided, please evaluate the performance of the above-named member based on 1) your observations as the Program Coordinator and 2) feedback from community partners and service recipients with whom service was provided as an AmeriCorps member. Space is provided at the end of the form and should be used for additional comments to highlight specific feedback or clarify a specific rating.

Directions for Using Rating Scale:

Circle the number that best describes the member’s performance.

Please rate the service member on the following criteria: *(please circle one for each question)*

Scoring: 1 – Excellent 2 – Good 3-Fair 4-Needs Improvement

A. GENERAL WORK ETHIC	1	2	3	4
1. Member can be relied upon to work steadily and effectively during service work.	1	2	3	4
2. Member demonstrates a professional demeanor when interacting with others as a service member.	1	2	3	4
3. Member maintains an appearance (grooming, attire, behavior) appropriate to the service assignment(s).	1	2	3	4
4. Member demonstrates concern for the quality, accuracy, and completeness of tasks performed as a service member.	1	2	3	4
5. Member demonstrates the ability to organize tasks effectively.	1	2	3	4
6. Member is able to accept and utilize critical feedback effectively.	1	2	3	4

7. Member demonstrates punctuality for work commitments and planned activities (includes meetings and trainings).	1	2	3	4
8. Member demonstrates ability to balance service and personal commitments appropriately.	1	2	3	4

B. COMMUNICATION				
9. Member demonstrates ability to communicate plans, needs, and feedback effectively to <i>community partners</i> .	1	2	3	4
10. Member demonstrates ability to communicate plans, needs, and feedback effectively to other <i>team members</i> .				
11. Member demonstrates ability to express and resolve conflicts effectively.				

C. AMERICORPS PHILOSOPHIES				
12. Member demonstrates ability to work cooperatively as a team member.	1	2	3	4
13. Member demonstrates an appreciation of and respect for other team members opinions, abilities, and needs.				
14. Member demonstrates skills in taking initiative in problem solving and project management.				
15. Member demonstrates an understanding of the AmeriCorps mission and philosophies.				
16. Member demonstrates an understanding of their role as a citizen in the community.				
17. Member demonstrates a sense of commitment to the health of their community.				
18. Member carries through on commitments for service projects.				
19. Member demonstrates leadership skills in team activities.				
20. Member demonstrates ability to work with community partners effectively.				

21. Briefly discuss the special strengths this member has demonstrated.

22. Briefly discuss any area(s) on which this member should focus to improve his or her effectiveness as a service member.

23. Would you recommend this member to another service corps? _____ Yes _____ No

Additional Comments: (Use additional space if needed.)

Signature of
Member: _____ Date: _____

Signature of
Evaluator: _____ Date: _____

If above is a person other than the Program Coordinator, briefly explain relationship to Corps member.

Member response to this
evaluation: _____

7 ~ 9 Months

Program Development & Management



The three program areas—Community and Site Partnerships, Member Development and Support, and Financial and Grants Management—discussed throughout the Guide are continued during this time phase. In each area, you will focus your time and effort on implementing and following through on activities started at the beginning of your program. Therefore, this section of the Guide is intentionally short.

This program phase emphasizes the activities around performance measurement, continuous improvement, and communication with stakeholders. How have we done? What else needs to be done? What can be done better? The idea is to continue doing many of the program development and support tasks you started months before, only now you want to reflect on how to do them even better. As you move through these middle months, you will be able to identify your program's good practices and use them to help you shape your ideas for the next program year.

At the end of this section, you will be able to

- Identify components of your program where improvements can be made using a continuous improvement tool.
- Identify ways to sustain your program over time with or without AmeriCorps funding.
- Access and use a variety of tools and electronic resources to complete all activities in the Tools for Success section.

7 ~ 9 Months

Program Development & Management



Continuous Improvement

What does Continuous Improvement mean?

Continuous improvement is about finding better ways to do things. You will essentially scrutinize all components of the program in search of opportunities for improvement. This process will ultimately lead to more satisfied customers and better results.

Why is continuous improvement important?

If you create an organizational culture focused on continuous improvement, long-term sustainability can be assured. Continuous improvement involves understanding stakeholders' expectations and meeting those with a well-run program. It also means taking real action to improve upon gaps in practices or functions. The health of an organization and its staff really depends on a culture of making things better.

How do you do it?

✓	Review the Principles of Continuous Improvement from the Corporation's <i>Handbook for Continuous Improvement</i> .
✓	Create a climate within the organization that values constructive criticism and approaches problems as opportunities to grow and learn.
✓	Engage staff in identifying ways to improve practices.
✓	Use data collection tools discussed earlier to substantively improve your program functions.
✓	Where possible, involve stakeholders as key resources to assist in improving processes.

Resources

Resource	Description	Contact
National Service Resource Center	Contains descriptions of tools and practices that service and other organizations use to continuously improve their ability to accomplish results.	www.nationalserviceresources.org/

7 ~ 9 Months

Program Development & Management



Program Sustainability

What does program sustainability mean?

Sustainability means that a program is able to “stay alive” and be kept viable for an extended period of time even with reduced, or in the absence of, AmeriCorps funding. Sustainability relates directly to the organization’s ability to develop funding resources it needs to maintain the current services and operations, and plan for the future. It usually includes efforts to increase the public’s awareness of your activities and services.

Why is program sustainability so important?

If your organization and AmeriCorps program are serving the community well, then the community probably wants you around for many more years to come. However, sustainability can be a difficult status to achieve. Many nonprofit organizations need to be mindful of fluctuations in the general economy, the additional resources (personnel, space, equipment, etc.) required for program expansion, the degree of public awareness about the program, the ratio of paid staff to volunteers, the potential for safely expanding the volunteer staff, and other issues. Suffice it to say, there are many factors that can positively or negatively impact program sustainability.

How do you do it?

✓	Commit to on-going evaluation mechanisms for staff, service site partners, AmeriCorps members, community members, and other key stakeholders.
✓	Use performance measurement data to identify gaps that might detract from your program’s potential to be sustainable over time. Work to close those gaps.
✓	Identify the impact on the community and stakeholders if your program were removed. Use this to inform planning outreach and strategic partnership building.
✓	Look at the long-range plans for your organization. Identify possible budgetary and/or staffing shortfalls in the areas of fundraising, public awareness, performance measures, cross-sector partnerships, and volunteers or interns.
✓	Continue collaborating with service site partners and others to enhance the impact of the AmeriCorps program services.
✓	Engage board members in identifying and cultivating resources to sustain the program over the long-term.

Resource

Resource	Description	Contact
National Service Resource Center	Contains descriptions of tools and practices that service and other organizations use to imbed program sustainability.	www.nationalserviceresources.org/

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Principles of Continuous Improvement

1. Our “customers” are the reason we exist. We must stay attuned to their needs and strive always to exceed their expectations.
2. Volunteers, participants and staff are customers too. They must be motivated, trained, and satisfied if they are to serve our customers well.
3. It is not enough to talk about customer satisfaction. We must set measurable goals, communicate them throughout our organization, regularly and systematically gauge our progress against these goals, and take action to continuously improve their performance.
4. Anytime we learn we are falling short, we have an opportunity to improve. Anytime we learn we are meeting or exceeding targets, we have an opportunity to set higher targets.
5. Continuous improvement is the responsibility of everyone in our organization.
6. Effective communication within our organization is essential to continuous improvement. To help improve the organization, staff must understand what customers’ value and how well customers’ think the program is doing.
7. Constructive criticism is a positive step toward a solution, not a negative spotlight on a mistake. We learn from our failures as well as from our successes.
8. Creating energized, empowered teams is the best catalyst for improving an organization. Motivated teams can produce extraordinary results—results that exceed those achieved by individuals or less cohesive groups.

10 ~ 12 Months

Maintaining the Program



Congratulations! You have almost completed one year of operating an AmeriCorps program.

Much of the work you will engage in between now and the conclusion of your program year will be a combination of continuing current activities, completing year-end evaluations and reporting requirements, celebrating and thanking partners and participants, and assisting members in their transition from AmeriCorps to their next steps in life.

At the end of this section, you will be able to

- Assess your outcomes. Write and submit your final progress report.
- Present your successes, accomplishments, and challenges in a board presentation to senior staff.
- Correctly exit members in WBRs.
- Access and use a variety of tools and electronic resources to complete all activities in the Tools for Success section.



Final Progress Report

What is the final Progress Report?

The final progress report is the last report detailing your program's accomplishments, outcomes, great stories, and progress to your state commission or national parent organization. It is submitted electronically through WBRs.

Why do you need to submit the final Progress Report?

Final progress report is used to aggregate information about service for your state commission and or parent organization. Depending on whether you must report to a state commission or parent organization, this information is pulled into a required annual report (Grantee Progress Report – GPR) that is submitted to the Corporation and used to demonstrate the overall impact of the AmeriCorps programs nationwide.

How do you do it?

✓	Submit the final progress report as required.
✓	Maintain a file of other progress reports and on-going program information to draw from in order to complete the final progress report. Reports submitted to the appropriate bodies will be maintained in WBRs.



Year-End Senior Management Board Presentation

What is a Year-End Senior Management Board Presentation?

Most likely the advisory body, board, or senior management team has been actively involved and briefed on the progress of the AmeriCorps program. As the program year comes to a close, this is an excellent time to bring board members back together to share the successes and challenges of the first year of program implementation.

Why do you need to conduct a Year-End Senior Management Board Presentation?

At the conclusion of the program year, it is imperative to formally address the board and communicate the lessons learned over the course of the program year to gain continued support and commitment. Board members need to know where they can be helpful and where they might need to intervene on behalf of the organization. If additional resources are needed to sustain the program, enlist board members to identify and cultivate those resources. If your program needs to strengthen its visibility in the larger community, your board members need to be apprised of how they can assist.

How do you do it?

✓	Make sure you have accurate information from key stakeholders, including staff members.
✓	Identify the appropriate persons to address the board.
✓	Create an agenda to guide your presentation.
✓	Update the board on a budget changes or impending issues.
✓	Create simple, clear handouts that illustrate the important points you want to make.
✓	Anticipate questions the members might have about the implementation and management of the project.
✓	Identify specific ways that board members can get involved.
✓	Use evaluation data collection to strengthen presentation, i.e. program accomplishments.



Exit Members in WBRS

What does it mean to exit members in WBRS?

Exiting a member means that he/she is no longer active in the program and program staff have completed the necessary WBRS forms to notify the Corporation. This may be the result of a member's termination from the program for cause or compelling personal circumstances or the successful completion of service hours and program obligations. Within 30 days following the end of each Corps member's term of service, you must update his/her enrollment status in the WBRS system. For each corps member, you must complete an End of Term form in WBRS. This form contains a statement about the member's total service hours. Those that you certify as eligible to receive an educational award, are automatically downloaded to the National Service Trust.

Why do you need to exit members in WBRS?

This is a mandatory requirement of your AmeriCorps grant. If a member's data is not entered into WBRS showing that she/he completed the required hours, the member will not be eligible to receive the Educational Award. Failure to appropriately exit corps members and account for grant funds can adversely affect the administrative and financial status of your organization. The most important consideration is this can adversely impact the member's eligibility for and receipt of their educational award.

How do you do it?

✓	Ensure that the Member Information Profile in WBRS is complete and accurate. This form was done at the beginning of the program year and should be reviewed again before exiting members
✓	Ensure that local record keeping of AmeriCorps members' hours is accurate.
✓	Exit all members within the 30 days of the end of the AmeriCorps members' term of service.

Frequently Asked Questions

Do I wait until the end of the service year to exit members? *No. Exit members as they complete their service hours, or immediately if a member is asked to leave the program early. All members must be exited within 30-days of the program end date.*

10 ~ 12 Months

Community & Site Partnerships



Most AmeriCorps programs cannot be successful without the support and participation of the service sites and community partners. To sustain these partnerships, you will need to perform several key tasks: conduct a final site visit, formally recognize the partners' contributions, and renew Site agreements with those community partners who wish to continue their relationship with your program.

At the end of this section, you will be able to

- Conduct final site visits if necessary.
- Celebrate the successes of your organization and your host/service site partners.
- Complete the financial closeout process.
- Access and use a variety of tools and electronic resources to complete all activities in the Tools for Success section.

10 ~ 12 Months

Community & Site Partnerships



Final Site Visit

What is a final Site Visit?

A final site visit can guide each organization to reflect on the viability of the overall service relationship including challenges or areas of conflict. The outcome of a final site visit can guide both organizations to determine whether continuing the partnership would be productive.

Why should I be concerned with conducting a final Site Visit?

The final site visit provides you with a picture of the site's overall functioning. This visit can also guide future conversations related to partnering for the following program year. The final site visit not only provides time and space to see how the organization is functioning, but also whether the AmeriCorps program fits well with the mission of the partnering organization.

How do I do it?

The general purpose of site visits may include one or more of the following:

✓	Assess administrative, financial, management and organizational capabilities and systems.
✓	Identify or clarify problems, issues, or concerns.
✓	Resolve or follow up on problems, issues, or concerns.
✓	Monitor systems, policies, practices, or procedures.
✓	Monitor and review compliance with grant award.
✓	Identify technical assistance and training needs.
✓	Provide technical assistance.
✓	Establish a continuous improvement system for financial management and grants compliance.

Resources

<i>Resource</i>	<i>Description</i>	<i>Contact</i>
Effective Practices Database	Contains a number of tools for conducting a site visit.	www.nationalservicerresources.org/

10 ~ 12 Months

Community & Site Partnerships



Site Recognition

What is Site Recognition?

Celebration, acknowledgement, thanks! It takes a lot of work to make change in a community. It is equally strenuous to build an outstanding partnership. At the end of a year of service, take the opportunity to highlight and celebrate the successes of your site partners.

Why should you implement a Site Recognition program?

Recognition is a crucial element in maintaining a great partnership. Partners invest significant human and financial resources to build the relationships, serve the community, and support the members. Show your appreciation for their effort and commitment.

How do you do it?

✓	Develop a mechanism to collect “great contributions”.
✓	Budget for a year-end celebration.
✓	Publish a newsletter to highlight great achievements.
✓	Create an organizational award to acknowledge publicly a strong partnership.
✓	Use the media to get the word out about your sites.
✓	Be creative! Recognition can come in many forms and should be personalized.
✓	Make it someone’s job to maintain relevant information about your site partners.
✓	Consider a recognition program as an investment in organizational and community loyalty.



Financial Closeout Process

What is the Financial Closeout Process?

The financial closeout process requires state commission and parent organizations to complete and submit final program reports, identify financial adjustments and payments left to be satisfied, inventory and account for equipment and supplies purchased through the grant, finalize the financial relationship between any subgrantees, submit the final Financial Status Report through eGrants and reconcile the final FSR to the SF 272 and cash drawn from the Department of Health and Human Services (HHS) Payment Management System. **This occurs at the end of the project period usually 3-years.**

Why is the Financial Closeout Process important?

The process allows the Corporation to reconcile grant expenditures, de-obligate unspent funds, and close accounts at HHS. To ensure that future grant opportunities are not adversely impacted, it is imperative for your organization to complete the financial closeout obligations within 90 days from the end of the grant or as instructed by your state commission.

How do you do it?

✓	Ensure that accurate records are maintained throughout the year to account for your organization's stewardship of the grant.
✓	Submit the following documents within 90-days of the end of the approved project period in accordance with the state commission or parent organization requirements through eGrants. <ol style="list-style-type: none">1. Final (Cumulative) Financial Status Report (FSR)2. Final (Cumulative) Project Report3. Inventory of Equipment (if appropriate)4. Inventory Residual Supplies (if appropriate)5. Subgrant Certification (if applicable)
✓	Review and reconcile your account at HHS. Your FSR and the SF 272 must match. You must also draw out the same amount of funds from HHS that you report on the 272 and the FSR. If the numbers don't match you may owe the Corporation funds.

Frequently Asked Questions

Who is responsible for the closeout of subgrants and what is the applicable procedure? *Each grantee is responsible for the closeout of all its subgrants. The grantee completes and signs a certification form when subgrantee closeout is completed. Only one certification is required for all subgrants that a grantee has to close. It is submitted to the Corporation along with the other documents required for closeout. The procedures applicable to the closeout of a primary grant are also applicable to the closeout of a subgrant.*

To whom should a grantee send the final FSR? *The grantee will submit the final FSR through eGrants to its assigned Grants Management Specialist.*

10 ~ 12 Months

Financial & Grants Management



What happens if a grantee is unable to meet the required match at the end of the project period? Failure to meet the minimum percentage of match could result in a downward adjustment of the federal award and the grantee having to refund a portion of the award to the Corporation.

How long does it take to complete grant closeout? Closeout can take a few days or weeks depending on the completeness of the documents on file and the time it takes to resolve any financial or programmatic issues identified during the review.

For how long after closeout must a grantee retain grant records? Under CNCS regulations, financial records and all other records pertinent to a grant must be retained for a period of three years from the date of submission of the final expenditure report (FSR). This requirement is included in the Grant Provisions. If an audit is initiated prior to the expiration of the three-year retention period, records must be retained until audit findings involving such records have been resolved and final action taken. While not required, some programs find it useful to retain records up to seven years from the end of term for members, given that the members have seven years to use the Education Award.

What should a grantee do if a subgrantee was discontinued and there is no one available to do close out? The grantee is responsible for the closeout of all its subgrants. So if a subgrant is discontinued before the end of the project period, the grantee should secure all pertinent financial and programmatic reports from the subgrantee at that time. Using these reports and its own records, the grantee should be able to account for the discontinued subgrant and complete the closeout process.

Can a grantee use an FSR generated through WBRS or is a paper copy required for closeout? WBRS is not capable of generating a final and cumulative FSR at this time. For this reason, a grantee must submit a paper copy of the final FSR for purposes of closeout.

Resources

Resource	Description	Contact
Corporation for National and Community Service	Financial management closeout forms.	http://www.americorps.org/resources/closeout_forms.html
Corporation for National and Community Service	A comprehensive list of FAQs related to the closeout process.	http://www.nationalservice.org/resources/cross/closeout_qanda.html

A BRIEF HISTORY OF NATIONAL SERVICE

When faced with challenges, our nation has always relied on the dedication and action of its citizens. The Corporation for National and Community Service (CNCS) carries on a long tradition of citizen involvement by providing opportunities for Americans of all ages to improve their communities through service.

The Civilian Conservation Corps

During the Great Depression of the 1930s, President Franklin D. Roosevelt created the Civilian Conservation Corps. Four million young people joined in response to his call to service, restoring the nation's parks, revitalizing the economy, and supporting their families and themselves. For 11 years the Civilian Conservation Corps provided billions of dollars in services and enabled millions of families to live in dignity.

The GI Bill

During the 1940's, the GI Bill linked wartime service to educational benefits, offering returning World War II veterans the opportunity to pursue higher education in partial compensation for service to their country. Veterans improved their own lives by attending college. They also contributed mightily to America's future. With the education they received, those citizens helped spark the economic boom that helped make America the world's leading economy.

Peace Corps

In the 1960s the call to service came from President John F. Kennedy, who challenged Americans in his inaugural address "Ask not what your country can do for you, ask what you can do for your country." In response to this challenge, the Peace Corps was born. The Peace Corps continues to engage thousands of volunteers who travel the world far and wide, building schools where none existed, helping farmers provide food for the hungry, and creating hospitals to care for the sick. After returning from overseas, Peace Corps volunteers put their new knowledge of others to work at home, in the spirit of citizenship, changing America for the better.

The War on Poverty

President Lyndon B. Johnson brought the spirit of the Peace Corps home to America by creating Volunteers in Service to America (VISTA) in 1964. VISTA, which is now part of AmeriCorps, continues to fund programs under the sponsorship of local public agencies or nonprofit organizations to improve the condition of people living in under-served, low-income communities throughout America. Other initiatives such as the Retired and Senior Volunteer Corps (RSVP), the Foster Grandparent Program, and the Senior Companion Program were developed in order to engage older Americans in the work of improving the nation.

Youth Service Movement

In 1970, Congress created the Youth Conservation Corps (YCC), a summer environmental employment program for youth ages 15-18. In 1978, a Young Adult Conservation Corps (YACC) became part of CETA, but was eliminated in 1982 by the Job Training Partnership Act

(JTPA) which did not include national service programming. Some components of YCC and YACC remained active in several states, funded through public and private dollars, and in 1976, California became the first state to create its own youth conservation program, the California Conservation Corps. Youth Conservation Corps still operates on a limited basis in some national parks and wildlife refuges. Private funders helped create additional youth corps programs during the seventies, including the Youth Volunteer Corps of America, City Year, and YouthBuild. Associations such as Youth Service America (YSA) and the National Association of Service and Conservation Corps (NASCC) were formed to work with the various youth service movements. Youth service programming grew on college campuses, sponsored by such national programs as the Campus Outreach Opportunity League (COOL) and Campus Compact.

Revival of Interest National and Community Service

President George H. W. Bush helped spark a revival of interest in national service when he instituted the White House Office of National Service in 1989. In 1990 Congress passed the National and Community Service Act, which created a Commission on National and Community Service sought to “renew the ethic of civic responsibility in the United States.” Full implementation began in 1992, when the commission awarded \$64 million in grants to support four broad types of state and local community service efforts. These initiatives were the Serve-America programs (now Learn and Serve) which involved school-aged youth in community service and service-learning through a variety of school and community-based activities; Higher Education Innovative Projects aimed at involving college students in community service and at promoting community service at educational institutions; American Conservation and Youth Service Corps, supporting summer and year-round youth corps initiatives that engage both in- and out-of-school youth in community service work; and the National and Community Service Demonstration Models, for programs that were potential models for large-scale national service. The National Civilian Community Corps (NCCC), a demonstration program to explore the possibility of using post-Cold War military resources to help solve problems here at home, was enacted later as part of the 1993 Defense Authorization Act. It is a residential service program modeled on the Depression-era Civilian Conservation Corps and the United States military.

National and Community Service Trust Act

President Bill Clinton sponsored the National and Community Service Trust Act, a revision of the National and Community Service Act of 1990, which was passed by a bipartisan coalition of Members of Congress and signed into law on September 21, 1993. The legislation created a new federal agency, the Corporation for National and Community Service (CNCS), to administer federally-funded national service programs. The law created AmeriCorps, which was designed to support local, state, and national organizations across the nation that involve Americans in results-driven community service. Individual AmeriCorps participants, known as members, typically serve for a year, during which they receive a living allowance. After service, members receive an education award, administered by the National Service Trust, and paid as a voucher redeemable for current education costs at colleges, universities, other post-secondary institutions, and approved school-to-work programs, or to pay back qualified student loans already incurred. The legislation drew on the principles of both the Civilian Conservation Corps and the GI Bill, encouraging Americans to serve and rewarding those who do. The new agency also took over the programs of two previous agencies, ACTION, which was responsible for running VISTA and the

National Senior Service Corps programs, and the more recent Commission on National and Community Service, including the NCCC, forming a new network of national service programs under AmeriCorps.

Service in the New Millennium

In his State of the Union address on January 29, 2002, President George W. Bush called on all Americans to serve their country for the equivalent of two years and announced the creation of the USA Freedom Corps, an umbrella network for volunteerism. A coordinating council housed at the White House and chaired by the President, is working to expand and strengthen federal service programs like the Peace Corps, Citizen Corps, AmeriCorps, and Senior Corps, and to raise awareness of and break down barriers to service opportunities with all federal government agencies. Several bills have been introduced in Congress over the past three years to increase funding for national service and to reauthorize the National and Community Service Act.

CORPORATION FOR NATIONAL AND COMMUNITY SERVICE PROGRAMS

CNCS provides opportunities for Americans of all ages and backgrounds to serve their communities and the nation through three programs: AmeriCorps, Senior Corps, and Learn and Serve America. Members and volunteers serve with national and community nonprofit organizations, faith-based groups, schools, and local agencies to help meet pressing community needs. CNCS is part of USA Freedom Corps, the White House initiative to foster a culture of citizenship, service, and responsibility, and help all Americans answer the President’s Call to Service. CNCS fosters civic responsibility, strengthens the ties that bind us together as a people, and provides educational opportunity for those who make a substantial commitment to service.

Each year, CNCS also sets forth specific goals, such as recent ones to increase volunteer generation, to make funding more accessible to small community and faith-based organizations, and to increase civic engagement. Occasionally, CNCS will fund special initiatives, such as the Overcoming the Digital Divide and America Reads programs in order to meet pressing national needs.

AmeriCorps

This program, sometimes referred to as “the domestic Peace Corps,” is the national service program that engages Americans of all ages and backgrounds in results-driven service in the five priority areas of education, public safety, environment, homeland security, and other human needs. AmeriCorps programs provide full and part-time opportunities for members to provide service to their communities through community organizations and agencies. Over 250,000 people have served in AmeriCorps since the program was founded ten years ago.

Within AmeriCorps, there are three major goal areas:

Needs and Service Activities	AmeriCorps programs provide a variety of specific and identifiable services that address community needs. This may involve direct service or capacity building activities that provide a direct benefit to communities.
Participant Development	AmeriCorps expands opportunities, helping those who help AmeriCorps. Because of their AmeriCorps service, members develop additional skills, gain valuable experience, and receive education awards that can be used for post-secondary education or to repay student loans. To help ensure that members are prepared for and benefit from their service, programs provide members skills and leadership training.
Strengthening Communities	AmeriCorps strengthens communities by involving citizens directly in serving community needs. AmeriCorps members help bring individuals and groups from different backgrounds together to cooperate in achieving constructive change and to solve critical community problems.

AmeriCorps*State and National Direct

AmeriCorps*State and National members participate in local service programs operated by community based nonprofit organizations, local and state government entities, Indian tribes, territories, institutions of higher education, local school and police districts, and partnerships among any of the above. Members serving in these programs help meet communities' critical education, public safety, environment, homeland security, and other human needs.

Approximately three-quarters of AmeriCorps grant funding goes to state commissions appointed by governors, which in turn distribute and monitor grants to local organizations and agencies in response to local needs. These programs are called AmeriCorps*State programs. They are funded either through a formula allotment granted to each state or through a competitive process wherein programs compete for funding against other programs throughout the nation. The other quarter of AmeriCorps funding is granted by the CNCS through a competitive grants process to national nonprofit organizations operating programs in more than one state. These programs are called AmeriCorps*National Direct. Program recruitment, selection, placement of members, and supervision are the responsibility of the grantees. Within AmeriCorps*State and National, there are also Tribes and Territories programs, Education Awards programs, and other special initiatives.

AmeriCorps*VISTA

AmeriCorps*VISTA members serve low-income communities and families across the country. Members of AmeriCorps*VISTA work and live in the communities they serve, creating or expanding programs that continue after they complete their terms of service.

AmeriCorps*VISTA members are assigned to local project sponsors and focus on building community capacity, mobilizing community resources, and increasing self-reliance. VISTA project host sites are selected by the State Offices of CNCS, with the approval of each state's governor.

AmeriCorps*NCCC

AmeriCorps*NCCC is a 10-month residential national service program for more than 1,200 members ages 18 to 24. Based on a military model, it sends members in teams of 10 to 14 to help nonprofit groups provide disaster relief, preserve the environment, build homes for low-income families, tutor children, and meet other challenges. AmeriCorps*NCCC teams meet community needs in cooperation with non-profit programs, state and local agencies, and other community groups. Members live at one of five regional campuses located in Charleston, South Carolina, Denver, Colorado, Perry Point, Maryland, Sacramento, California, and Washington, D.C., though their projects often take them to other communities throughout their region. Members are trained in CPR, first aid, and mass care and can be assigned to new duties on short notice, they are particularly well-suited to meeting the emerging homeland security needs of the nation.

National Senior Service Corps

The National Senior Service Corps, also known informally as "Senior Corps," taps the skills, talents, and experience of more than 500,000 Americans age 55 or 60 and older to meet a wide range of community challenges through three programs: Foster Grandparents, Senior Companions, and RSVP. These programs receive funding through annual appropriations and are

selected by CNCS State Offices on a non-competitive basis. In addition, National Senior Service Corps programs may compete nationally for funding as Programs of National Significance.

The Foster Grandparent Program (FGP)

Foster Grandparents serve as mentors, tutors, and caregivers for at-risk children and youth with special needs through a variety of community organizations, including schools, hospitals, drug treatment facilities, correctional institutions, and Head Start and day-care centers. In fiscal year 2001 more than 30,000 Foster Grandparents tended to the needs of 275,000 young children and teenagers. Local nonprofit organizations and public agencies receive grants to sponsor and operate local Foster Grandparent projects. The Foster Grandparent Program is open to people age 60 and over with limited incomes. Organizations that address the needs of abused and neglected children, troubled teens, young mothers, premature infants, and children with physical disabilities work with the local Foster Grandparent program to place and coordinate the services of the Foster Grandparent volunteers. Local partners (called volunteer stations) include children's services agencies, child and youth-oriented charities, and faith-based institutions.

The Senior Companion Program (SCP)

Senior Companions serve one-on-one with the frail elderly and other homebound persons who have difficulty completing everyday tasks. They assist with grocery shopping, bill paying, and transportation to medical appointments, and they alert doctors and family members to potential problems. Senior Companions also provide short periods of relief to primary caregivers. Because of the program, thousands of citizens are able to live with dignity in their own homes. SCP is open to healthy individuals age 60 and over with limited incomes. In fiscal year 2001, 15,500 Senior Companions tended to the needs of more than 61,000 adult clients. Local nonprofit organizations and public agencies receive grants to sponsor and operate Senior Companion projects. Community organizations that address the health needs of older persons work with local SCP projects to place and coordinate the services of the SCP volunteers. These local partners (volunteer stations) include hospitals, area agencies on aging, and home health groups. The stations' professional staff identify individuals who need assistance and work with SCP projects to place them with Senior Companions.

Retired and Senior Volunteer Program (RSVP)

RSVP volunteers serve in a diverse range of nonprofit organizations, public agencies, and faith-based groups. RSVP is open to people age 55 and over. Among other activities, RSVP volunteers mentor at-risk youth, organize neighborhood watch programs, test drinking water for contaminants, teach English to immigrants, and lend their business skills to community groups that provide critical social services. In fiscal year 2001, approximately 480,000 volunteers served an average of four hours a week at an estimated 65,000 local organizations. Local organizations, both public and private, receive grants to sponsor and operate RSVP projects in their community. These projects recruit seniors to serve from a few hours a month to almost full-time, though the average commitment is four hours a week. Most volunteers are paired with local community and faith-based organizations that are already helping to meet community needs.

Learn and Serve America

Learn and Serve America provides grants to schools, colleges, and nonprofit groups to support efforts to engage nearly one million students from kindergarten through college students in community service linked to academic achievement and the development of civic skills. This type of learning, called service-learning, improves communities while preparing young people for a lifetime of responsible citizenship. Learn and Serve grants are used to create new programs or replicate existing programs, as well as to provide training and development to staff, faculty, and volunteers. CNCS funds state education agencies, state commissions on national and community service, nonprofit organizations, Indian tribes, and U.S. territories, which then select and fund local service-learning programs through Learn and Serve K-12. Institutions of higher education and consortia are funded directly through Learn and Serve Higher Education.

FUNDING FOR NATIONAL SERVICE ACTIVITIES

Corporation for National and Community Service

As the primary federal source of funding for national service activities, CNCS is obviously the most important player on the field. But AmeriCorps operates in a decentralized manner that gives a significant amount of administrative responsibility to states and national and local nonprofit groups. CNCS realizes that the many organizations and individuals around the country with which it shares administrative responsibility for AmeriCorps will look to it for assistance on a broad range of issues and problems. The following table suggests some of the principal support functions that CNCS offices can provide:

OFFICE	SUPPORT FUNCTIONS
Program	Houses CNCS program officers who are the primary liaison with and support and respond to programmatic issues for State Commissions and National Direct parent organizations.
Grants	Oversees financial aspects of grants and awards.
Training and Technical Assistance	Works with national technical assistance providers and with training and technical assistance coordinators in State Commissions.
Trust	Manages the education awards for AmeriCorps members.
Public Affairs	Oversees media relations, marketing and publications.
Public Liaison	Oversees national initiatives, national service days, and all AmeriCorps awards.
General Counsel	Provides legal counsel for CNCS and can answer legal questions related to AmeriCorps program management.
OIG	Detects and deters waste, fraud, abuse, and violations of law of CNCS funded programs.
Recruitment	Provides support for the online recruitment system and other national recruitment efforts.

For administrative purposes, CNCS has divided the nation into five regions, called clusters, to facilitate efficient communication and better support national service efforts. Each cluster has some specific CNCS personnel, such as a program officer, assigned to assist it. The table below can be used to identify which cluster a particular AmeriCorps program belongs to.

Atlantic	North Central	Pacific	Southern	Southwest
Connecticut	Illinois	Alaska	Alabama	Arizona
Delaware	Indiana	California	District of Columbia	Arkansas
Maine	Iowa	Hawaii	Florida	Colorado
Maryland	Michigan	Idaho	Georgia	Kansas
Massachusetts	Minnesota	Montana	Kentucky	Louisiana
New Hampshire	Nebraska	Nevada	Mississippi	Missouri
New Jersey	North Dakota	Oregon	North Carolina	New Mexico
New York	Ohio	Utah	South Carolina	Oklahoma
Pennsylvania	South Dakota	Washington	Tennessee	Texas
Rhode Island	Wisconsin	Wyoming	Virginia	
Puerto Rico			West Virginia	
Vermont				
Virgin Islands				

CNCS State Offices

CNCS also operates offices in each state. These offices are responsible for administering AmeriCorps*VISTA programs as well as the three National Senior Service Corps programs. The CNCS employees in these locations assist with the monitoring of National Direct AmeriCorps programs, solicit and review Martin Luther King Jr. Day of Service grants in their states, and participate in cross-program planning initiatives, including Unified State Plan development. One of them, usually the state office director, serves as an ex-officio member of the State Commission.

State Commissions

State commissions exist to foster a bipartisan state-level commitment to advancing service initiatives in the state. State commissions have direct accountability for the grantees running local AmeriCorps programs. To do this, State commissions must develop a solid infrastructure that will enable them to select and support high quality national service programs and effectively manage commission activities in their states. Commissions monitor and evaluate programs to ensure they comply with legal and grant requirements, are progressing well towards meeting program objectives and have high quality service projects and management systems. Commissions also have the broad role of developing and communicating a statewide vision and ethic of service and promoting that vision throughout their respective states. That vision should incorporate all components of AmeriCorps (State, National, VISTA, NCCC, and Tribes and Territories, as applicable), Learn and Serve America, the National Senior Service Corps, and the larger volunteer community. It can be realized by promoting the idea of service statewide, by offering supportive training and technical assistance activities, both formal and informal, and by fostering partnerships between CNCS-funded programs and other service and volunteer activities.

National Directs

National Directs are national nonprofit organizations operating in at least two states that run a multisite AmeriCorps program. They are responsible for administering a grant process for their subgrantees, monitoring and evaluating them to ensure they comply with legal and grant requirements, offering technical assistance and training specific to AmeriCorps, and providing financial oversight. Both National Directs and their subgrantees work in collaboration with State Commissions and CNCS State Offices by attending statewide events and conferences and keeping them informed of their activities.

State Education Agencies

State education agencies (SEAs) receive and administer the school-based Learn and Serve funds. These monies are distributed to SEAs on a formula basis and support service-learning activities for K-12. States have significant latitude in how they design their programs. For example, some states offer large grants for district-wide implementation of service-learning. Other states offer smaller grants to individual schools, classrooms, or teachers. Unlike AmeriCorps, SEAs apply for funding for service-learning and then decide which programs/districts to fund through a competitive process that occurs after the fact. Funds support both the implementation and capacity-building of service-learning. In addition, SEAs may choose to apply for other Learn and Serve funds on a competitive basis. These funds may vary each year depending on CNCS' priorities and appropriations. SEAs are responsible for monitoring, reporting, and training the

CNCS-funded service-learning programs they administer.

Other Stakeholders

Other stakeholders include corporations, private foundations, elected officials, the media, and some state agencies. State Commissions and National Directs need to build long-lasting relationships with these other stakeholders to strengthen service programs and build public support for national and community service.

AMERICORPS: JUST THE FACTS

<i>TYPE OF PROGRAM</i>	<i>WHO CAN APPLY</i>	<i>PROGRAM PURPOSE</i>	<i>FOR AN APPLICATION</i>	<i>MATCH REQUIREMENT*</i>
AmeriCorps* State	<ul style="list-style-type: none"> State and local non-profit organizations State and local Governments State and local education institutions Indian Tribes Faith-based and other community organizations 	<p>To engage AmeriCorps members in providing direct service to address unmet community needs. Local programs design service activities for a team of members serving full-time/part-time for one year or during the summer.</p> <p><u>Sample activities:</u> restore parks, tutor youth, assist crime victims, or build homes.</p>	<p><u>State Commissions.</u> Most states have a governor appointed board that administers AmeriCorps programs within the state.</p> <p>For programs in North and South Dakota contact the Corporation for National and Community Service 202-606-5000 ext. 346</p>	<p>The Corporation requires a 15% cash match for AmeriCorps member support cost and 33% cash or in-kind match of the overall operating program costs.</p> <p>State commissions may add additional match requirements.</p>
AmeriCorps* National	<ul style="list-style-type: none"> National non-profit organizations that operate in two or more states (such as the American Red Cross or Habitat for Humanity) Consortia formed across two or more states, consisting of institutions of higher education, Indian tribes, or other nonprofits, including labor and faith-based and other community organizations. 	Same as above	Corporation for National and Community Service 202-606-5000 ext. 163	15% cash match for AmeriCorps member support cost and 33% cash or in-kind match of the overall operating program costs.
AmeriCorps Indian Tribes and US Territories	<ul style="list-style-type: none"> Indian Tribes Programs in US Territories Territories on behalf of the territory and individual programs 	Same as AmeriCorps* State	Corporation for National and Community Service 202-606-5000 ext. 417	15% cash match for AmeriCorps member support cost and 33% cash or in-kind match of the overall operating program costs.
AmeriCorps Education Awards Program	<ul style="list-style-type: none"> Local non-profit organizations, state and local units of government, except State Education Agencies apply through the state commission State commissions, national non-profits, multi-state collaborations, faith-based and other community organizations Institutions of higher education and state education agencies may apply to the State Commission or directly to the Corporation 	<p>Same as AmeriCorps* State</p> <ul style="list-style-type: none"> Summer programs College-based programs Program sponsors with capacity to manage service programs with minimal or no additional CNCS funds. 	<p><u>State Commissions</u></p> <p>Corporation for National and Community Service 202-606-5000 ext. 417</p>	<p>Programs cover all costs with the exception of the education awards earned by members and up to \$400 per full-time equivalent program participant.</p>

* For updated information, consult your grant provisions for relevant rules and grant guidance.

USEFUL ONLINE RESOURCES

About the Corporation	http://www.cns.gov/about/index.html
AmeriCorps Gear and Signage	www.nationalservicecatalog.org
AmeriCorps Regulations and Legislation	www.nationalservice.org/about/ogc
AmeriCorps Provisions and Handbooks	www.americorps.org/resources/manuals.html
Education Award Information	www.americorpsalums.org
	www.americorps.org/members/resource/education/
National Service Calendar, Listserves and other resources	www.nationalserviceresources.org
National service programs funded by CNCS	www.americorps.org
Recruitment	http://www.americorps.org/resources/recruitment.html
State Profiles	www.nationalservice.gov/state_profiles/
Training and Technical Assistance Providers	www.americorps.org/resources

GLOSSARY OF TERMS

Administrative costs	Administrative costs are costs associated with the overall administration of a Program, and are defined in the General Provisions, in the Administrative Costs section of the AmeriCorps Grant Provisions.
AmeriCorps member “Corps member” “Member”	An individual serving on a full-time or part-time basis in an AmeriCorps program. Corps is pronounced “core”, as in "apple core".
AmeriCorps member “Corps member” “Member”	An individual serving on a full-time or part-time basis in an AmeriCorps program who is eligible to receive an education award or alternative post service benefit.
AmeriCorps National Service Network	The network of all AmeriCorps programs, including AmeriCorps*USA, AmeriCorps*VISTA, and AmeriCorps*NCCC.
AmeriCorps Promise Fellows	Promise Fellows serve in a leadership corps of approximately 500 full-time AmeriCorps members who spearhead community efforts to deliver the Five Promises of the Presidents’ Summit for America’s Future to children and youth across the nation.
AmeriCorps*NCCC (National Civilian Community Corps)	AmeriCorps*NCCC is a 10-month, full-time residential program which combines the best practices of civilian service with the best practices of military service, including leadership development and team-building. A team-based program for young women and men between the ages of 18 - 24.
AmeriCorps*State and National	A national service program operated by local and national non-profits, local and state government entities, Indian tribes, territories, and institutions of higher education. Members participate in local service programs operated by not-for-profits, local and state government entities, Indian tribes, territories, and institutions of higher education, local school and police districts, and partnerships among any of the above.
AmeriCorps*VISTA (Volunteers in Service to America)	A national service program focused on eradicating poverty. Members serve full-time at community-based organizations. Members of AmeriCorps*VISTA work and live in the communities they serve, creating or expanding programs that can continue after they complete their service.
Audit trail	A step-by-step record review by which accounting transactions (revenues and/or expenditures) can be traced to the source. Thereby, the validity and accuracy of accounting data can be verified by reviewing the sequence of events leading to the stated data.
Benefits	Included in AmeriCorps member benefits are training/education, health insurance (for full-time AmeriCorps members not otherwise covered), and childcare (for eligible full-time AmeriCorps members). See Grant Provisions for a list of specific benefits.
Budget	A budget is a document that lists planned income and expenses, specifically showing the dollar value for each. At a later date, actual transactions should be compared to the budget for analysis and control of future budgetary decisions. Of the many kinds of budgets, a cash budget shows cash flowing in and out of an organization; an expense budget shows expected payments of money; and a capital budget shows anticipated payments for capital projects. Budgets are separated into various categories and the categories are further broken down into individual components, called line items. For

	example, travel could be a line item within a broader category called operational expenses.
Chart of accounts	A chart of accounts is a listing of account names, descriptions of transactions, and classifications that are used for recording accounting transactions. Information is generally numbered and grouped according to assets, liabilities, revenues and/or expenses.
Community-based agency	A private nonprofit organization (including a church or other religious entity) that is representative of a community or a significant segment of a community and is engaged in meeting human, educational, environmental, or public safety community needs.
Corporation for National and Community Service (CNCS) “The Corporation”	The Corporation for National and Community Service established under section 191 of the Act (42 U.S.C. 12651).
Corps	This word is used to describe a team of AmeriCorps members. The word is pronounced as “core” (as in "apple core").
Education award	An Education award is an award provided to a member who has successfully completed a required term of service in an approved national service position and who otherwise meets the eligibility criteria in the Act. An education award may be used: (1) to repay qualified student loans, as defined in the Act; (2) toward educational expenses at a Title IV Institution of Higher Education; and (3) toward expenses incurred in participating in school-to-work programs approved by the Secretaries of Labor and Education. A benefit of \$4,725 (full-time) or \$2,363 (part-time) AmeriCorps members may receive after successful completion of a term of service.
eGrants	The Corporation for National and Community Service's online grant application and management system. eGrants is designed to automate the entire grants management process from application to closeout.
End-outcome indicators	End-outcome indicators specify changes that have occurred in the lives of the community beneficiaries and/or members that are significant and lasting. These are actual impacts, benefits or changes for participants during or after a program.
Fiduciary	A relationship that implies a position of trust or confidence wherein one person is usually entrusted to hold or manage property or money for another.
Financial Statements	A written document(s) describing the net worth, earnings or other monetary relationship of a person, or business; a record of financial information and financial status. The most common of the many types of financial statements are the balance sheet, the income statement and the cash flow statement.
Fiscal systems	Procedures and systems used to maintain accurate financial records and to safeguard the assets of the company.
General Equivalency Diploma (GED)	A degree obtained by examination that may substitute for a high school diploma. A Member must agree to obtain a GED or high school diploma before using his or her AmeriCorps education award.
Grantee	The direct recipient of an AmeriCorps grant. The Grantee is responsible for ensuring that Sub-Grantees or other organizations carrying out activities under the grant award comply with AmeriCorps provisions, including regulations and OMB circulars. The Grantee is legally accountable to the Corporation for the use of grant award funds and is bound by the provisions

	of the Grant.
Host site	An organization that administers an AmeriCorps program or serves as a member placement site. This is a group or organization that acts as a project sponsor and is responsible for the actual location where a project is to be performed. This entity may provide task specific training, technical assistance supervision, or other services as agreed to in a “contract” between the program and the host site.
Independent auditor	A professional accountant who has passed certain exams, achieved a certain amount of experience, and met all other statutory and licensing requirements of the state where he or she performs his/her services. The word independent is added to emphasize that the professional work is performed by a fair, unbiased source.
Intermediate-outcome indicators	Intermediate-outcome indicators specify changes that have occurred in the lives of community beneficiaries and/or members, but are not necessarily a lasting benefit for them. They are observable and measurable indications of whether or not a program is making progress.
Internal controls	<p>The control of an organization’s operations, through procedures designed to safeguard its assets, generate appropriate accounting data, ensure efficiency, and confirm compliance with management policies and grant regulations. An important component of internal controls is to ensure that no one individual should be tasked to perform all the steps of a specific process, particularly relating to financial transactions. This will ensure that there are adequate checks and balances to safeguard the organization’s assets and produce accurate financial information. Internal controls should be written down, documenting specific policies and procedures an agency and its personnel adheres to.</p> <p><i>Examples of good internal controls include: Documented policies and procedures, adequate review process for financial reports and budgets, adequate cash management procedures, monthly bank reconciliations, an asset tracking system, an established financial system to track members’ and employees’ time and activities, and a system to follow-up on problems identified to ensure resolution.</i></p>
Living allowance	A living allowance, not a “wage” or “salary”, that may be provided to AmeriCorps members enrolled and active in an AmeriCorps program.
National and Community Service Act of 1990	The Act of 1990 was passed by Congress and signed into law to establish the Commission on National and Community Service.
National and Community Service Trust Act of 1993	The Act of 1993 amended the National and Community Service Act of 1990, to establish the Corporation for National Service by combining the Commission for National and Community Service and ACTION.
“Act”	
National service identity	The sense of purpose and membership in a common program that all AmeriCorps members share. National identity can be promoted and strengthened by everything from buttons and T-shirts to reflection activities, common national service projects, and civic education.
National Service Network	The network of Corporation funded service programs, including AmeriCorps, Learn and Serve America and National Senior Service Corps.
National Service	The trust fund in the United States Treasury Department was established by the National and Community Service Trust Act of 1993 to hold and to

Trust Fund	disperse AmeriCorps education awards.
“Trust Fund” or “Trust.”	
Office of Management and Budget (OMB)	The Federal government’s Office of Management and Budget assists the President in preparing the annual federal budget and oversees its execution. OMB must approve the Corporation’s regulations, applications, forms, and any other documents that affect the public.
Output indicators	Output indicators are the amounts or units of service that members or volunteers have completed, or the number of community beneficiaries the program has served. Output indicators do not provide information on benefits or other changes in the lives of members and/or community beneficiaries.
Performance Measures	Performance measures are indicators intended to help a grantee measure the results of an AmeriCorps program’s activities on community beneficiaries and participants. Performance measures are based on outputs, intermediate outcomes, and end outcomes.
Program	A coordinated group of activities linked by common elements such as recruitment, selection, and training of participants and staff, regular group activities and assignment to projects organized for the purpose of achieving the mission and goals of national and community service.
Project	An activity or a set of activities carried out as part of a program.
Request for Proposal (RFP)	Request for Proposal issued by the Corporation, or another agency, to solicit program applications for available grant funds.
Service site	A service site is a place where service is being performed by AmeriCorps members and perhaps other people who are volunteers and/or employees. A service site is not a “work” or “job” site.
Source documentation	Information that is used to support individual accounting transactions. A utility invoice would be an example of the source documentation for that particular expense that is noted in the chart of accounts and/or general ledger.
Stakeholder	One or more people or organizations that have a high degree of interest in your organization’s vision, mission, and success.
State commission	A 15 - 25 member, independent, bipartisan commission appointed by a governor to implement service programs in a state. Each state commission receives funding from the Corporation to operate the commission, and may apply to the Corporation for formula and competitive program grant funds.
Sub-grantee	An organization receiving AmeriCorps Grant funds from a Grantee of the Corporation.
Term of service	A term of service is determined by each program and must contain at least 1700 hours served within 9 to 12 months (full-time); a minimum of 900 hours served within 2 years (part-time).
Training and Technical Assistance (T/TA)	The support and assistance provided to AmeriCorps programs to strengthen program operations.
Web Based Reporting System (WBRS)	Used by programs awarded grants through AmeriCorps State/National.

Written policies and procedures

An established and comprehensive set of *written policies and procedures* should be reviewed annually to ensure they are up-to-date. Policies should detail appropriate segregation of duties to ensure no one individual is responsible for the entire financial management and accounting system. Policies and procedures should include detailed information on all financial management and accounting practices.
