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# Program Director's Guide

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2008

# OR Program Directors' Guide

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# ACRONYMS USED THROUGHOUT THIS GUIDE

AA	Accounting Administrator	IHS	Indian Health Service
AASC	American Association of State Service Commissions	IRS	Internal Revenue Service
AARP	American Association of Retired Persons	ITT	Indian Tribes and Territories
AC	AmeriCorps	JAN	Job Accommodation Network
AEAP, EAO	AmeriCorps Education Award Only Programs	LULAC	League of United Latin American Citizens
APFP	AmeriCorps Promise Fellows Programs	MIB	Mississippi Industries for the Blind
AC*RPS	AmeriCorps Web-based Recruitment and Placement System	MLK	Martin Luther King, Jr.
ADD	Accidental Death and Dismemberment	MSY	Member Service Year
ADR	Alternative Dispute Resolution	NAACP	National Association for the Advancement of Colored People
AFDC	Aid to Families with Dependent Children	NACCRRRA	National Association of Child Care Resource and Referral Agencies
CCDF	Child Care and Development Fund	NCCCC	National Civilian Community Corps
CEO	Chief Executive Officer	NCLR	National Council of La Raza
CFR	Code of Federal Regulations	NSFP	National Service Fellowship Program
CHIP	Children's Health Insurance Program	NSL	National Service Leadership Program
CNCS	Corporation for National and Community Service	NSLI	National Service Leadership Institute
COA	Cost of Attendance	NSRC	National Service Resource Center
CPR	Cardiopulmonary Resuscitation	OIG	Office of the Inspector General
CRF	Constitutional Rights Foundation	OMB	Office of Management and Budget
DBTAC	Disability and Business Technical Assistance Centers	PD	Program Director
EA	Executive Administrator	PSA	Public Service Announcement
ED	Executive Director	PSSA	President's Student Service Award
EPICENTER	Effective Practices Information Center	P/TOA	Parent/Tribal Organization Administrator
ETR	Education Training Research Associates	P/TOD	Parent/Tribal Organization Director
FICA	Federal Insurance Contributions Act	RSVP	Retired and Senior Volunteer Program
FD	Financial Director	SA	Site Administrator
FSL	Fundamentals of Service Leadership	SD	Site Director
FSR	Financial Status Report	SSDI	Social Security Disability Insurance
FTE	Full-time Equivalent	SSI	Supplemental Security Income
FMS	Financial Management System	TANF	Temporary Assistance to Needy Families
GED	General Educational Development Diploma	TDD	Telecommunications Device for the Deaf
HHS	Health and Human Services	T/TA	Training and Technical Assistance
ICC	Inter-Corps Council	TTY	Teletype
ICI	Institute for Community Inclusion	USC	United States Code
ID	Identification	VISTA	Volunteers in Service to America
ILC	Independent Living Centers	WBRS	Web-Based Reporting System
INS	Immigration and Naturalization Service	WIC	Women, Infants, and Children

# USEFUL ONLINE RESOURCES

Recruitment	<a href="http://www.americorps.org/for_organizations/members/index.asp">http://www.americorps.org/for_organizations/members/index.asp</a>
Member Enrollment	wbrs.net
AmeriCorps Gear and Signage	<a href="http://www.nationalservicecatalog.org">www.nationalservicecatalog.org</a>
AmeriCorps Provisions and Regulations	<a href="http://www.americorps.org/for_organizations/manage/index.asp">http://www.americorps.org/for_organizations/manage/index.asp</a>
AmeriCorps Legislation	<a href="http://www.americorps.org/for_organizations/manage/index.asp">http://www.americorps.org/for_organizations/manage/index.asp</a>
AmeriCorps Alumni	<a href="http://www.americorpsalums.org">www.americorpsalums.org</a>
Information about Education Award	<a href="http://www.americorps.org/for_individuals/alumni/index.asp">http://www.americorps.org/for_individuals/alumni/index.asp</a>
Resource center for information	<a href="http://www.nationalservicerresources.org">http://www.nationalservicerresources.org</a>

## Introduction

This manual does not supersede any of the requirements established by the terms, conditions, and provisions of an AmeriCorps grant or contract, or the standard federal requirements applicable to all federal grants. Likewise, the information contained in this resource manual does not include all the legal requirements of an AmeriCorps grant, nor does it constitute CNCS' official definitive interpretation of the law, regulations, and policies related to AmeriCorps programs. Rather, it is intended as a resource guide to help program staff establish and maintain sound operations in compliance with federal and state statutes, regulations, provisions, and policies.

**To find guiding policy documents go to:**

[http://www.americorps.org/for\\_organizations/manage/index.asp](http://www.americorps.org/for_organizations/manage/index.asp)

## **OVERVIEW**

### **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.

### *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 whose mission was 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 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, involves Americans in results-driven community service. Individual AmeriCorps participants, known as members, 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 management of 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.

#### *Service in the New Millennium*

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 within all federal government agencies.

## The Corporation for National and Community Service

Created in 1993, The Corporation for National and Community Service supports service at the national, state and local levels, overseeing three main initiatives:

- AmeriCorps – whose members serve with local and national organization to meet community needs and after service receive education awards to help finance college or training (AmeriCorps\*State and National, AmeriCorps\*VISTA and AmeriCorps\*NCCC)
- Learn and Serve – which provides support to schools, higher education institutions and community-based organizations, that engage students, their teachers, and others in service-learning.; and
- Senior Corps, through which Americans 55 and older contribute their skills and experience (RSVP, Foster Grandparents and Senior Companions)

As the primary federal source of funding for national volunteer activities, CNCS is obviously the most important “player on the field”. 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 the CNCS office can provide:

OFFICE	AmeriCorps SUPPORT FUNCTIONS
Program	Oversees programmatic aspects of grants and awards. Program officers serve as the primary liaisons with state service commission and the National Program grantees.
Grants	Oversees financial aspects of grants and awards.
Office of Leadership Development and Training	Works with national technical assistance providers and with training and technical assistance coordinators in state service commissions.
Trust	Manages the education awards for AmeriCorps members.
Public Affairs	Oversees media relations, marketing and publications, including the online recruitment website.
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.
Office of the Inspector General	Detects and deters waste, fraud, abuse, and violations of law of CNCS funded programs.

### CNCS State Offices

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

**For a list of CNCS State officers and contact information, please go to:**

**<http://nationalservice.org/about/contact/stateoffices.asp>**

## **State Service Commissions**

State service commissions exist to foster a bipartisan state-level commitment to advancing service initiatives in the state. State service commissions have direct accountability for the grantees running local AmeriCorps programs. Commissions monitor and evaluate grantees to ensure they comply with legal and grant requirements, are progressing well towards meeting performance measures, and have high quality service projects and management systems. Each commission also has the broad role of developing and communicating a statewide vision and ethic of service, and promoting that vision throughout the state. That vision incorporates all components of AmeriCorps (State, National, VISTA, and NCCC, as applicable), Learn and Serve America, the Senior Corps, and the larger volunteer community.

For a list of State Service Commission Executive Directors and their contact information, please go to: <http://nationalservice.org/about/contact/statecommission.asp>.

There are many roles that commission program staff play, many hats that they wear, and many priorities that they juggle. For example, some program staff are also the fiscal staff, the training staff, the service-learning staff, and the administrative staff for their organizations.

Some commissions also have a Disability Coordinator. CNCS grants funds intended to promote the inclusion of individuals with disabilities in national service programs to State Service Commissions annually based on a tiered formula based on state population. While granted to State Service Commissions, the funding is intended not only for use by AmeriCorps\*State grantees but also to support the participation of individuals with disabilities in AmeriCorps programs operated by AmeriCorps\*National sites in each state.

## **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. SEAs are responsible for monitoring, reporting, and training the CNCS-funded service-learning programs they administer.

## **AmeriCorps Programs**

AmeriCorps includes AmeriCorps\*VISTA, AmeriCorps\*State and National and AmeriCorps\*NCCC. *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 can continue after they complete their service. AmeriCorps\*VISTA members are assigned to local project sponsors and focus on building community capacity, mobilizing community resources and increasing self-reliance.

*AmeriCorps\*NCCC* (AmeriCorps National Civilian Community Corps) is 10-month full-time residential program operated directly by the Corporation. AmeriCorps\*NCCC combines the best practices of civilian service with the best practices of military service, including leadership development and team-building. Members live and train at campuses located in; Denver, CO; Perry Point, MD; Sacramento, CA; and Vinton, Iowa. AmeriCorps\*NCCC conducts service projects in partnership with local and state sponsors.

*AmeriCorps\*State and National* members participate in local service program operated by not-for-profit 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. Program recruitment, selection, and placement of members is the responsibility of the grantees. Members serving in these programs help meet communities' critical education, public safety, environmental and other human needs.

### **AmeriCorps\*National Directs**

AmeriCorps\*National provides grants directly to national public and nonprofit organizations that sponsor service programs, Indian tribes, and consortia formed across two or more states, including faith-based and community organizations, higher education institutions, and public agencies. Grants assist these groups in recruiting, training and placing AmeriCorps members to meet critical community needs in education, public safety, health, and the environment.

They are responsible for administering a grant process for their operating sites (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 sites work in collaboration with State Service Commissions and CNCS State Offices by attending statewide events and conferences and keeping them informed of their activities.

### **AmeriCorps State**

AmeriCorps\*State works with Governor-appointed State Service Commissions to provide grants to public and nonprofit organizations that sponsor service programs around the country, including hundreds of faith-based and community organizations, higher education institutions, and public agencies. Grants assist these groups in recruiting, training and placing AmeriCorps members to meet critical community needs in education, public safety, health, and the environment.

### **Montana Commission on Community Service**

The Montana Office of Community Service seeks to renew the ethic of civic responsibility by: Encouraging citizens of all ages and backgrounds to engage in service; Involving youth in the life and work of communities; and Expanding service opportunities for all Montanans.

The Commission is a diverse, non-partisan, and Governor appointed body representing a broad cross-section of community service interests and statewide leadership in Montana. The Commission's administrative arm, the Governor's Office of Community Service (OCS), is a state agency funded by the Corporation for National and Community Service and the State of Montana. OCS serves as an

independent non-partisan commission which assumes responsibility for the distribution and expenditure of funds related to AmeriCorps\*State programs.

In general, grantees are funded on a three-year cycle, with the availability of funds in the second and third year being contingent upon a number of factors, including the availability of funds and MSYs, performance, compliance with federal and state regulations, submission of a continuation or renewal application outlining programmatic changes, a detailed budget for the applicable program year, and any other criteria established in the original award agreement. After each three year cycle, all grantees seeking to continue must reapply (re-compete) as new programs.

**Eligible Activities**

To help applicants develop responsive proposals, program directors should understand the eligible activities in each of the three primary goal areas for AmeriCorps programs. Examples of eligible activities are shown in the table below.

Needs and Service Activities	Direct service activities such as tutoring children, building houses, or delivering meals to homebound seniors.*
Participant Development	Training related to the service activities, leadership opportunities for members, citizenship training, and activities designed to develop an ethic of lifelong service for AmeriCorps members.
Strengthening Communities	Recruitment and management of volunteers, support for small community and faith-based organizations, capacity building and sustainability, and community involvement and consultation.

**AMERICORPS AFFILIATION**

**AmeriCorps Terms**

The following names, phrases, and symbols can be used to help promote national recognition:

- ★ AmeriCorps
- ★ the AmeriCorps national service network
- ★ getting things done
- ★ AmeriCorps member
- ★ the AmeriCorps logo

The word *AmeriCorps* does not have to be included in a program’s name; however, it can be used on key elements of the program’s uniform, literature, and other materials. Consistent use of basic terms helps reinforce AmeriCorps common objectives and clarifies AmeriCorps for the public. Here are some frequently used terms related to AmeriCorps:

*AmeriCorps members*

AmeriCorps members should not be called *volunteers, workers, staff, participants, or employees*. The word *member* is lowercase.

### *AmeriCorps national service network*

This term refers to all of the programs affiliated with AmeriCorps—including AmeriCorps\*NCCC, AmeriCorps\*VISTA, AmeriCorps\*State and National, AmeriCorps\*Tribes and Territories, the AmeriCorps Education Awards Program, AmeriCorps.

### *Living allowances*

AmeriCorps members earn living allowances—not salaries or wages.

### *National service, community service*

This term refers to any of the programs affiliated with the Corporation for National and Community Service. In addition to AmeriCorps, national service programs include Learn and Serve America and Senior Corps (the Foster Grandparent Program, the Senior Companion Program, and the RSVP). These different programs are also referred to as streams of service.

### *Serve, service*

When possible, serve and service should be used rather than work when referring to AmeriCorps members.

### *Service-learning*

“Service-learning is an educational method that engages young people in service to their communities as a means of enriching academic learning, promoting personal growth, and helping them to develop the skills needed for productive citizenship” (Dunlap, N.C., Drew, S.F. and Gibson, K. (1994) Serving to Learn: K8 Manual. Columbia, S.C: South Carolina Department of Education).

### *USA Freedom Corps*

The USA Freedom Corps includes AmeriCorps, SeniorCorps, Peace Corps, and Citizen Corps, which focuses on homeland security. The initiative also includes the President’s call for every American to devote the equivalent of at least two years of their lives - or 4,000 hours - in service to others.

## **Ethic of Service**

The centerpiece of the AmeriCorps ethic is getting things done, strengthening communities and developing members’ opportunities and civic responsibility. To help create an esprit de corps for members, programs are encouraged to plan on the basis of “classes” of members who begin and “graduate” from their terms of service.

Orientation sessions for your staff, site supervisors and members should include a discussion on the national scope of AmeriCorps and an explanation of how your local program fits in to the AmeriCorps network. Appropriate opening ceremonies, including the administration of the AmeriCorps Pledge, are important for all members. Programs should also arrange for members to participate in other joint activities such as service days (such as the Martin Luther King, Jr. Day of Service) and conferences arranged by state commissions or by the Corporation.

## **Logos**

Camera-ready logos, and logos on disk, are available from Mississippi Industries for the Blind for programs to use for service gear, stationery, signs, recruitment brochures, application forms, member curriculum and orientation materials, banners, press releases, and publications created by AmeriCorps members. In addition, logos can be downloaded for use from the Corporation's website at [http://www.nationalservice.org/about/media\\_kit/logos.asp](http://www.nationalservice.org/about/media_kit/logos.asp)

In order to preserve the AmeriCorps identity, you must obtain written permission from the Corporation if you wish to:

- ★ use the AmeriCorps name or logo on materials that will be sold;
- ★ use the AmeriCorps name or logo on clothing not worn by members or alumni;
- ★ alter the AmeriCorps logo or use it as a part of any other logo or design; or
- ★ allow a donor to use the AmeriCorps name or logo in promotional material.

### **Service Gear and Affiliation Items**

To increase awareness of your service and the local impact of AmeriCorps (with the exception of Education Award Programs EAPs) programs must use the AmeriCorps name and logo on service gear and public materials such as stationery, application forms, recruitment brochures, orientation materials, member curriculum, signs, banners, press releases and publications created by AmeriCorps members in accordance with Corporation requirements.

The Corporation has contracted with Mississippi Industries for the Blind (MIB) for the warehousing and distribution of Service gear and national affiliation items. MIB will accept orders directly from programs and will ship from a central location. The program directly pays the supplier. Items can now be ordered online at [www.nationalservicecatalog.org](http://www.nationalservicecatalog.org).

Except for safety equipment, grantees may only charge the cost of member service gear to the federal share if it includes the AmeriCorps logo. Grantees may also add the AmeriCorps logo to their own local program uniform items using federal funds. All safety gear may be charged to the federal share, regardless of whether it includes the AmeriCorps logo. All other service gear must be purchased with non-federal funds.

To increase awareness of your service and the local impact of AmeriCorps members

For further information on AmeriCorps service gear and affiliation items, please contact the Office of Public Liaison or visit the catalog at [www.nationalservicecatalog.org](http://www.nationalservicecatalog.org).

### **Promoting Your Program**

Every year, thousands of stories about Senior Corps, AmeriCorps, and Learn and Serve America appear in the media – almost all generated by local project staff and volunteers. Publicizing your program is not a goal in itself. It's a means of building support for your program and increasing your likelihood of success. Taking the time to communicate with the public helps attract resources from your community, including volunteers, sponsors, and funding, and helps educate people about your program. You don't have to be a media pro to get good coverage, but having some tips and resources can help. Check out this site:

[http://www.nationalservice.org/about/media\\_kit/index.asp](http://www.nationalservice.org/about/media_kit/index.asp)

Also, in addition to AmeriCorps service gear, there are many other ways in which the common look and affiliation may be advanced by programs. (Some of these items may be purchased with grant money.)

- ★ Members should identify themselves as AmeriCorps members and describe AmeriCorps appropriately.
- ★ Signs should identify sites as AmeriCorps project sites.
- ★ Program staff should be able to discuss AmeriCorps with visitors.
- ★ Stationery, brochures, fax cover sheets, and newsletters can identify the program as AmeriCorps, including the use of the logo.
- ★ Your community should be aware that the members are AmeriCorps members.
- ★ Press releases and other public materials should note that the program is part of the AmeriCorps national service network.
- ★ Logos may be downloaded at [www.nationalservice.org/logos](http://www.nationalservice.org/logos)

Donors to local programs may not use the AmeriCorps name or logo in advertising or other promotional materials without the written permission of the Corporation. Permission may be withheld if recognition of the donor is inconsistent with the Corporation's policies and objectives.

In addition to the many publications available from the Corporation for National and Community Service (such as handbooks, manuals, and recruitment and marketing materials), local programs often develop their own materials. To let others know of your affiliation with AmeriCorps, you may want to use the AmeriCorps name and logo in your publications. Publications that are distributed externally must include the following acknowledgment and disclaimer:

“This material is based upon work supported by the Corporation for National and Community Service under AmeriCorps Grant No. \_\_\_\_\_. Opinions or points of view expressed in this document are those of the authors and do not necessarily reflect the official position of AmeriCorps or the Corporation for National and Community Service.”

Programs also must ensure that the publication is consistent with grant provisions limiting member activities (for example, no lobbying or religious materials).

## ***AMERICORPS RECRUITMENT***

### **General Information**

This section is intended to give you some basic strategies that you can adapt to recruit members from your community and information on how you can tap into the national pool of applicants. More detailed information is available at [http://www.americorps.gov/for\\_organizations/members/index.asp](http://www.americorps.gov/for_organizations/members/index.asp).

Whether you recruit locally or nationally, you are encouraged to target your recruitment activities to as many audiences as are appropriate. Diversity is an important issue in recruitment, and can be represented in many ways: age, gender, sexual orientation, economic, education background, race and ethnicity, skills, and physical abilities.

First, take some time to plan your general recruitment strategy, which should include:

- ★ position descriptions for your members;
- ★ a list of target groups that may be able to fill the positions; and
- ★ ways to make sure that your target groups are aware of your organization and the positions available.

### **Developing a Recruiting Message**

Once you develop a list of target groups, think of different ways you can market or “sell” your AmeriCorps message to each group. Remember to vary your approach because not all people will respond to the same message. Below are some basic “selling” points:

- ★ appeal of AmeriCorps and service
- ★ give back to your community
- ★ gain job skills and career networks
- ★ travel/meet new people/adventure
- ★ deferment for qualified student loans
- ★ education award to pay off student loans or for graduate school
- ★ opportunity to apply education and experience to help communities

Target your materials. What would attract an applicant to your program? Applicants want to know what they’ll be doing and what they’ll gain from service as an AmeriCorps member. Target your approach to specific audiences. For example, if your project focuses on education, advertise to education majors the valuable classroom experience that they’ll gain as AmeriCorps members. Ask your current members to comment on your existing materials and give you either formal or informal reactions. Even though you don’t need to incorporate all of their comments you are likely to receive some helpful feedback.

Make it personal. Personal contact makes the difference. Use your alumni (or current members on non-service hours) to attend a state fair, conference, or school career day to share their experiences. Consider holding an information session with the contacts that you’ve made. Invite your current members, service alumni, and other members in the area to share their experiences and give potential applicants a firsthand account of your program.

Respond quickly and follow up. Keep a record of people you’ve sent applications to or who have requested further information. Follow up with them with a postcard, phone call, or e-mail to invite them to take the next step. Offer suggestions to them on completing the application.

Collaborate and ask for help. There may be other programs recruiting in your area--check with them and find out how you can combine mailings, or share space at events with other programs. They may even have a list of people they were unable to place who could be perfect for your program. Also network with other parts of the national service network, including National Senior Service Corps and/or Learn and Serve programs in your area.

Network. People often decide to do something because someone they respect or trust has suggested it. Ask local high school counselors, college placement officers, and community leaders to promote AmeriCorps and your program. Again, consider your target audiences and the attraction that your program would hold for them.

Order your materials. Use the AmeriCorps Materials Request Form to order the recruitment materials that you need. [http://www.americorps.org/for\\_organizations/tta/forms.asp](http://www.americorps.org/for_organizations/tta/forms.asp) and [http://www.americorps.org/forms/ac\\_materials\\_request.pdf](http://www.americorps.org/forms/ac_materials_request.pdf)

### **Application Form for Members**

The Corporation has created a standard application for AmeriCorps, which you are encouraged to use as the application for your program. If you have your own application, you are asked to accept the AmeriCorps application from potential candidates who have enrolled on-line using the MyAmeriCorps website. You are welcome to use your own supplementary materials. If requested, programs must make their forms available in alternative formats for individuals with disabilities. If you need copies of the AmeriCorps application visit: [http://www.americorps.org/for\\_organizations/tta/forms.asp](http://www.americorps.org/for_organizations/tta/forms.asp)

If your program has its own application form, it may be beneficial to include an area where an individual lists any other AmeriCorps experience. If an individual is selected for a third or more term of service not in keeping with Corporation policy and regulations, the program will be liable for any Corporation funds used to support that individual.

### **National Recruitment Website -**

[http://www.americorps.org/for\\_organizations/members/index.asp](http://www.americorps.org/for_organizations/members/index.asp)

*My AmeriCorps*, the web-based system for the recruitment and placement of AmeriCorps members, allows individuals to learn about AmeriCorps programs throughout the country, to search for programs based on selected criteria and to apply on-line. It allows programs to search for individuals based on select criteria and to contact these individuals via e-mail. Programs may also receive and approve applications on-line.

The *My AmeriCorps* system is designed to generate interest in serving in AmeriCorps, to simplify the application process and to increase customer service to program staff and to potential applicants. A procedure is in place for potential members without internet access to become users by means of contract staff available via the toll-free number (800) 942-2677.

To assist you in reaching a national pool of potential members, you can list your program opportunities and select applicants online. We've consolidated our grants management and recruiting system so that you can perform both functions in one place. You will access the recruitment system through [eGrants](#), which you may already use.

**If you are new to AmeriCorps**, you will need to [register](#) to get an account as a Grantee. You will then need to contact your Grant Administrator to be given the capability to use the recruitment features in the system - a very quick and easy process. Then you are ready to begin posting opportunities, searching for applicants based on your needs, contacting applicants, reviewing applications and selecting your volunteers.

More specific instructions are available at:

[http://www.americorps.org/for\\_organizations/members/index.asp](http://www.americorps.org/for_organizations/members/index.asp)

## **AMERICORPS SELECTION**

### **Member Eligibility**

First, you must make sure the potential member is eligible.

To be eligible to enroll in AmeriCorps, an individual must:

- ★ be a U.S. citizen or U.S. national or a lawful permanent resident alien of the United States;
- ★ be at least 17 years old (or at least 16 years of age if the member is out of school and a participant in a youth corps or a program for certain disadvantaged individuals); and
- ★ have a high school diploma or GED or agree to obtain one while serving.

Programs must ascertain and document the citizenship/lawful permanent resident alien status of the members, a record of which should be kept in the member's file. A program may be at risk if it has accepted self-certification as the only document for member eligibility.

Second, you must create a member file and include in it all the appropriate documentation.

**Primary documentation of status as U.S. citizen or national.** The following are acceptable forms of certifying status as a United States citizen or national:

- ★ An official government issued birth certificate showing that the individual was born in one of the 50 states, the District of Columbia, Puerto Rico, Guam, the U.S. Virgin Islands, American Samoa, or the Northern Mariana Islands;
- ★ an unexpired U.S. passport issued to an individual as a U.S. citizen;
- ★ report of Birth Abroad of a Citizen of the United States (U.S. Dept. of State Form FS-240);
- ★ certificate of birth—foreign service (U.S. Dept. of State Form FS-545);
- ★ certification of Report of Birth (U.S. Dept. of State Form DS-1350); INS certificate of naturalization (INS form N-550 or N-570); or
- ★ INS certificate of citizenship (INS form N-560 or N-561).

**Primary documentation of status as a lawful permanent resident alien of the U.S.** The following are acceptable forms of certifying status as a lawful permanent resident alien of the United States.

- ★ Permanent Resident Card or Alien Registration Receipt Card (INS Form I-551) an unexpired passport indicating that the INS has approved it as temporary evidence of lawful admission for permanent residence; or

- ★ a departure record (INS Form I-94) indicating that the INS has approved it as temporary evidence of lawful admission for permanent residence.

**Secondary documentation.** If primary documentation is not available, the program must obtain written approval from the Corporation that other documentation is sufficient to demonstrate the individual's status as a U.S. citizen, U.S. national, or lawful permanent resident alien.

Please note that individuals who are in the United States under a student, work, or tourist visa are not eligible to become AmeriCorps members. Similarly, individuals who have refugee status but nothing indicating permanent resident alien status are not eligible to become AmeriCorps members.

### **High School Diploma and Self-Certification**

Individuals who do not have a high school diploma or equivalent upon entering AmeriCorps must agree in writing before enrolling in the program to obtain a high school diploma or its equivalent prior to using the education award, unless the program has conducted an educational assessment that indicates the member is incapable of obtaining a high school diploma or its equivalent. The grant provisions and the regulations (45 C.F.R. § 2522.200) list exceptions to this requirement. If the member successfully completes the term of service, he or she is eligible for an education award, which he or she may use after obtaining a high school diploma or equivalent.

For members who are school dropouts, programs must provide support services to help them get a high school diploma or equivalent certificate before exiting the program. Programs also may want to provide college readiness programs for members going on to higher education. Both high school/GED programs and college readiness programs can be integrated effectively with service-learning curricula. Members must have their high school diploma or equivalent, or obtain a waiver, to access their education awards.

Member files do not need to include a copy of the high school diploma or equivalent, if the completed member enrollment form with a signed self-certification regarding educational level is maintained in the member files.

### **Member Classification**

Members are not independent contractors. Members cannot be treated as independent contractors. They are enrolled in your program to perform direct community service. Programs are responsible for training and supervising members, for assigning service activities, for supporting and evaluating performance, for safeguarding safety, and for providing liability coverage.

### **Employee Displacement**

Programs may not permit a member to fill in for an absent employee. By law, members may not under any circumstances perform services, duties, or activities that had been assigned to an employee or to an employee who has recently resigned or has been discharged. Programs may not use a member in a way that will displace an employee or position or infringe on an employee's promotional opportunities.

### **Terms of Service**

The term of service must be defined as including at least 1,700 hours of participation over a period of 9 to 12 months for full-time members. Holidays, leave time, and other absences may not be counted toward service hours, but should be included in the programmatic year.

Members’ terms of service must be defined in the member contract. The program must provide contracts to the members upon their acceptance into the program. (See Sample Documents)

**Member Start and End dates**

Members start and end dates they must fall within the subgrant start and end dates. OCS issue’s contracts for a project period of 12 months. Members, whether stipend or not, cannot continue to serve if the service continues beyond the contract end date. If for some reason a situation comes up and members need to serve past the contract period then you will need for get approval from OCS first. Further, I ask that you notify me at least a month before the end of the contract. Keeping the subcontract open longer means that you will not be able to submit a final FSR or APR until all members have completed service.

**Number of education awards**

Under no circumstances will an individual be eligible to receive more than two education awards. These can be earned during the first two terms of national service. If a member is released for reasons other than misconduct prior to completing 15% of a term of service, that term does not count as one of the two terms for which an education award may be provided.

**Serving more than two terms**

The national service laws and Corporation policies impose certain restrictions within the various programs on the number of terms an individual may serve within that program. The following table outlines the limitations on the number of terms one may serve within the different AmeriCorps programs.

<i>AmeriCorps National Service Network</i>	<i>Maximum Number of Terms within each type of AmeriCorps Program</i>
AmeriCorps*State/National/ITT/Leaders	2
AmeriCorps*NCCC	2
AmeriCorps*VISTA	3

The Corporation has determined that individuals may, nonetheless, serve up to three terms of service across the different types of AmeriCorps programs and may receive Corporation-funded member benefits as long as the caps on the number of terms of service within each program are maintained. In no event may an individual serve more than a total of three terms in any combination of AmeriCorps programs. A term of service includes full-time, part-time, and reduced part-time service, as well as an uncompleted term (e.g., if a member leaves a program part-way through the term). The following table shows the different possibilities for individuals interested in serving more than one term. While other combinations totaling three terms may also be permissible (including service in Education Awards programs, for example), under no circumstances will an individual be eligible to receive more than two education awards.

## Eligibility Based Upon Prior National Service Experience

If you have completed one term in...	and you have completed a second term in...	Then you can serve a third term in...
AmeriCorps*VISTA	VISTA	VISTA AmeriCorps*State or National NCCC
	AmeriCorps*State or National	VISTA AmeriCorps*State or National NCCC
	NCCC	VISTA AmeriCorps*State or National NCCC
	Promise Fellows	VISTA AmeriCorps*State or National NCCC
AmeriCorps*State or National	VISTA	VISTA AmeriCorps*State or National NCCC
	AmeriCorps*State or National	VISTA NCCC
	NCCC	VISTA AmeriCorps*State or National NCCC
	Promise Fellows	VISTA AmeriCorps*State or National NCCC
AmeriCorps*NCCC	VISTA	VISTA AmeriCorps*State or National NCCC
	AmeriCorps*State or National	VISTA AmeriCorps*State or National NCCC
	NCCC	VISTA  AmeriCorps*State or National
	Promise Fellows	VISTA AmeriCorps*State or National NCCC

## Team Leaders

The National and Community Service Act, as amended, provides for approved national service positions to include a “position involving service as a crew leader in a youth corps program or a similar position supporting a national service program that receives an approved national service position” 42 U.S.C § 12573(6). This language allows programs, in addition to youth corps, to use AmeriCorps members to provide an additional layer of leadership and support for members under certain conditions.

The following is guidance on the use of AmeriCorps members as Team Leaders. Because of the need to ensure that Team Leader functions and staff functions remain clearly distinct, Corporation program officers may request a description of Team Leaders' roles and responsibilities.

In general, all prohibited activities listed in Section 5 of the AmeriCorps Provisions apply to Team Leaders just as they do to all AmeriCorps members. Team Leaders are not permitted to act in a staff capacity. Supervising members is a staff responsibility. Team Leaders must not be responsible for program development and coordination; however, they may assist by providing information and resources on best practices or by helping to develop portions of the program such as the training curriculum. In essence, under no circumstances should an AmeriCorps member serving as a Team Leader be the individual legally responsible for the program or other members.

The Team Leader position description should predominantly include activities that involve them in performing direct service or providing support to members engaged in direct service.

**Examples of *allowable* Team Leader activities:**

- ★ working alongside members performing direct service, to serve as a model and to provide on the spot assistance;
- ★ training members; providing guidance to members; providing support to members, including reflection exercises, conflict resolution, advice for transitioning out of AmeriCorps, etc.;
- ★ arranging member development activities;
- ★ leading monthly/weekly meeting of members;
- ★ leading and facilitating team service projects;
- ★ working with the community to develop partnerships, including community volunteers, that will support the members' projects; and
- ★ communicating with program staff, site supervisors, and other members to ensure the execution of a quality program that is consistent with the AmeriCorps provisions.

While Team Leaders are not to serve as the program's administrative staff, they may be engaged, on a limited basis, in activities that support the administration of the AmeriCorps program. These include:

- ★ raising funds or in-kind contributions in direct support of specific AmeriCorps projects, such as team service projects. See Section 5 of the AmeriCorps Provisions for greater detail regarding members and fundraising; and
- ★ participating in recruitment activities for new members.

**Examples of *unallowable* Team Leader activities:**

- ★ signing member timesheets;
- ★ managing the program's payroll and budget
- ★ evaluating member performance;

- ★ disciplining AmeriCorps members;
- ★ enrolling/dismissing AmeriCorps members;
- ★ writing and/or signing program reports;

### **Criminal Background Check**

There is an ever increasing need for programs that work closely with certain vulnerable populations to establish effective safeguards in place to protect members of these vulnerable populations from abuse or harm. The Corporation funds many programs that serve vulnerable populations, specifically, children, older persons, and individuals with disabilities. Consequently, the Corporation requires its grantees to comply with a baseline regulatory requirement to properly screen their participants and grant-funded employees.

CNCS requires all AmeriCorps State/National (including EducationAward Program) participants and grant funded staff, who, on a recurring basis, have access to children, persons age 60 and older, or individuals with disabilities to follow the requirements of National Service Criminal History Check. A National Service Criminal History Check consists of (1) a State criminal registry search, which involves a search of State law enforcement and court records (by name and/or fingerprint) to determine whether an applicant has a criminal history, and (2) a National Sex Offender Public Registry (NSOPR) check, which consists of individuals that are required by their States to register as sex offenders.

Programs should very carefully follow the requirements for National Service Criminal History Checks. Please refer to: [http://www.nationalservice.org/for\\_organizations/manage/history\\_checks.asp](http://www.nationalservice.org/for_organizations/manage/history_checks.asp) to ensure that the timing, safeguards, permissions and timing of this law are followed.

## ***Disability***

### **Accommodating Members with Disabilities**

You are urged to reach out to members who can contribute a diverse set of perceptions, skills, and life experiences to the program team.

In all cases, your selection process must be based on the qualifications of the applicants and whether or not they can perform the essential project activities, with or without reasonable accommodation of their mental or physical disabilities. Programs and activities must be accessible to persons with disabilities, and you must provide reasonable accommodation to the known mental or physical disabilities of otherwise qualified members, service recipients, applicants, and program staff.

You must make all selections and project assignments without regard to the need to provide reasonable accommodation. You are not asked to enroll individuals who are unqualified or who pose a direct threat to the health or safety of others [that cannot be eliminated through reasonable accommodation], nor are you required to make accommodations that are unduly burdensome or will alter your program design fundamentally. However, you must prove and document any such findings or decisions.

Once an individual requests an accommodation, you should evaluate your ability to provide that accommodation. The first step is to talk to the person – find out what functional limitations exist and

what essential functions need to be accomplished or what barrier exists to participation in the program or activity.

In many cases individuals will know what they need and how to secure it. In some cases, individuals will not be certain what they will need. There are several resources that you can call upon to assist you and the individual in evaluating appropriate and effective accommodations.

It is always a good idea to contact technical assistance resources when an individual requests an accommodation that involves getting or modifying equipment, or involves structural changes. There are resources that are expertly qualified to assist you.

- ★ The National Service Inclusion Project is a CNCS funded technical assistance provider that can assist you. [www.serviceandinclusion.org](http://www.serviceandinclusion.org)
- ★ The Job Accommodation Network (JAN) is another excellent resource that is available to you at no cost. JAN can be reached at (800) 526-7234 (voice/TTY).
- ★ Independent Living Centers (ILCs) are federally funded and located across the country and can provide you with assistance.

These resources are knowledgeable of effective, efficient accommodations. Often they can identify accommodations that are far less costly than – and often more effective than – persons who are not experts in accommodation can identify.

### **Providing accommodations: Financial or administrative burden**

In a few cases, you may receive requests for accommodations that you believe are unduly disruptive to your program or are too expensive. Under the Rehabilitation Act and the terms of your grant or agreement with the Corporation, you must provide accommodation, upon request by a qualified individual with disabilities, unless doing so is an undue financial or administrative burden to your program. This is a very high standard. Not being easily achievable does not meet this standard. Being difficult to achieve, time-consuming, or costly, do not meet this standard.

In addition, there are many factors that go into evaluating the obligation to provide accommodations.

Undue administrative burden means the accommodation will alter the fundamental nature of your program. For example, adjustment of hours is often a form of reasonable accommodation. However, you must carefully consider the circumstances and the legal requirements when adjusting hours for participants. AmeriCorps State/National programs have statutory requirements regarding service hours, and changes to hours that violate these requirements "alter the fundamental nature of the program." Therefore, these changes are not required for reasonable accommodation and providing them may violate the Corporation's statute.

You must first determine if your program has consistently applied these requirements to all your participants. Strict adherence to the legal requirements to deny a person an accommodation for his or her disability when flexibility is allowed for others is discrimination because of disability.

If consistently applied, the following scenarios would alter the fundamental nature of the program:

1. a full-time AmeriCorps State/National/NCCC member who is not required to work 1700 (or a higher minimum established by the program);

2. an AmeriCorps VISTA who is not available for service 24 hours a day, 7 days a week, in the same manner as other AmeriCorps VISTAs at that site or within that state; and
3. an AmeriCorps member who extends the time within which to complete the requisite number of hours. NOTE: There are ways to work around a fundamental alteration in the 12month completion requirement. If a person with a disability needs time off for extensive medical treatments, hospitalization, etc. or is unable to serve full time for a period, options are:
  - ★ They can be put on a non-disciplinary suspension for the period, with that time added to the end of the current service period. This allows the person to complete the full term of service and obtain the education award. It makes no difference if this puts their completion date after the end of the grant cycle. However, the participant cannot receive a living allowance during this period.
  - ★ There may be circumstances under which they can be converted to part-time status. This is dependent on program design and may affect the individual's member benefits.
  - ★ They can be released for compelling personal circumstances. This allows them to receive a prorated education award.

Undue financial burden considers many factors, including:

1. (The overall size of your entire organization (not just your national service or volunteer program) – numbers of employees and participants; number and type of facilities; and size of budget.
2. (b) The type of your operation, including the composition and structure of your entire organization's work force and service force.
3. (c) The nature and cost of the accommodation needed.

In all cases, if you fail to provide a reasonable accommodation when requested by a qualified individual with disabilities and claim undue burden, the onus is on you to fully justify your undue burden claim.

In some cases, there are funds available from the State Commissions to assist you in paying for accommodations. These funds may not be used to assist you in meeting basic accessibility and accommodation requirements, but they can be used to make your program more accessible than the minimum requirements mandate. Therefore, if providing an accommodation would be an undue financial burden for your organization, these funds may be available. Contact your State Commission Disability Coordinator for more information.

## ***AMERICORPS MEMBERS BENEFITS***

### **Living Allowance**

The National and Community Service Act of 1990, as amended, requires an AmeriCorps program to provide its full-time members with a living allowance. Each year the Corporation sets the minimum and maximum amount for living allowance payments. The living allowance is not a wage. The Corporation will continue to work with other federal agencies, states and local entities so that they treat the living allowance appropriately for determining eligibility for other assistance categories.

## **Health Care**

You must offer health care benefits to full-time members in accordance with AmeriCorps requirements. You may not pay health care benefits to less-than-full-time members with Corporation funds. You may choose to provide health care benefits to less-than-full-time members from other sources (i.e., non-federal). Less-than-full-time members who are serving in a full-time capacity for a sustained period of time (such as a full-time summer project) are eligible for health care benefits. The Corporation will not pay for dependent coverage.

## **Liability Coverage**

Programs must have sufficient liability insurance to protect the organization, employees, and members. Members engaged in both on- and off-site project activities must be covered. You should review your current policies to ensure they cover non-employees in special statuses, such as members. Programs should decide how much liability coverage is sufficient, given the specific risk factors the program presents. General liability insurance is an administrative cost that can be pro-rated and charged against the grant (subject to your grant's administrative cost limit) or included in the program's match. If it is included in the approved budget, insurance purchased specifically to cover member liability can be charged as a direct program cost.

## **Child Care**

Eligible full-time members may receive subsidized child care through AmeriCorps\*CARE while they are participating in national service. AmeriCorps\*CARE child care benefits are administered through the offices of the National Association of Child Care Resource and Referral Agencies (NACCRRA). Program directors, AmeriCorps members, and child care providers may contact AmeriCorps\*CARE at (800) 570-4543, through NACCRRA's website at <http://www.naccrra.org/ameriCorps/index.php>.

In order to be eligible for the benefits, the member's family must be income-eligible and the child care provider must be legally qualified in the state. AmeriCorps\*CARE will reimburse qualified child care providers up to 100% of the current local market rate for child care services. Reimbursement rates and income eligibility are based on locally established guidelines under the Child Care and Development Fund (CCDF), a federally funded program administered by each state.

Parents are responsible for registration, late, and all other miscellaneous fees incurred by the child's acceptance, enrollment, or participation in the child care program.

### **Qualified child care providers**

To qualify for reimbursement through AmeriCorps\*CARE, a child care provider must be legally qualified under the state's CCDF guidelines. Each state has its own qualification criteria. Reimbursements will not be made to ineligible providers.

You may contact AmeriCorps CARE for technical assistance in determining member eligibility, provider qualification, and for information about child care rates by calling (800) 570-4543 from 8:30 a.m. to 5:00 p.m. EST.

### **Eligibility for child care benefits**

Full-time AmeriCorps members are eligible for child care benefits if they:

- ★ are parents or legal guardians of dependents under 13 years of age, who reside with them;

- ★ need child care paid for, in order to participate;
- ★ are not receiving child care from another available source at time of acceptance into the program; and
- ★ have a family income that does not exceed the income level established by the state’s CCDF guidelines.

Members are not eligible to receive child care benefits through AmeriCorps CARE while receiving other child care subsidies.

**Half-time members and child care benefits**

Although no portion of child care expenses for part-time members may be paid from Corporation funds, programs may choose to provide child care to part-time members from other sources. With Corporation approval, part-time members serving full-time hours for a sustained period of time (such as a full-time summer project) may receive child care benefits through AmeriCorps\*CARE, but this extension of child care benefits must be approved in the grant or via prior written approval from the Corporation’s Office of Grant Management.

Half-time members) may be eligible for child care subsidies available through state-administered child care assistance programs. Various state child care programs are also available to families who are on TANF, “at risk” of going on TANF, or losing TANF due to the AmeriCorps living allowance. AmeriCorps member eligibility does not guarantee availability of child care assistance in any particular state. Local agencies such as the child care resource and referral agency in your area can help part-time members research information about these programs. You may also contact the state’s child care coordinator (usually housed in the state Department of Education, Social Services, Human Services, Social Insurance, or similar agency) for guidance

**Education Awards**

**Requirements for Earning and Education Award**

A member must not only complete the minimum number of hours for full-time or part-time, but also meet the performance standards established by the program. In addition, the member must serve for the duration of the service program as established. For example, if a program is an 11-month program with a minimum of 1,800 hours, the member is required to meet those objectives before being certified as eligible for the education award. Such requirements must be delineated in the member contract.

Member terms of service fall under distinct categories based on the hours of service completed. Members will receive an education award according to the following chart:

<i>Term</i>	<i>Hours completed</i>	<i>Value of Education Award</i>
Full-time	at least 1700	\$ 4,725.00
Half-time	at least 900	\$ 2,362.50
Reduced half-time	at least 675	\$ 1,800.00
Quarter time	at least 450	\$ 1,250.00
Minimum time	at least 300	\$ 1,000.00

## **Education Award Usage**

An AmeriCorps member may use the education award to:

- ★ Repay qualified student loans
- ★ Pay for current educational expenses at a Title IV institution of higher education. The term “current” educational expenses means expenses incurred for a period of enrollment in an institution of higher education that begins after an individual enrolls in a term of service as an AmeriCorps member.
- ★ Pay for expenses incurred in participating in an approved school to work program.

Members can split up their awards to pay a combination of student loans and/or educational expenses. Not all schools or loans are eligible. See the following section for a description of “qualified loans.” The payment will be made to the school or loan holder designated by the member. It cannot be made to the AmeriCorps member. However, as with other federal student assistance, schools may pass on to students certain allowances that are included in the cost of attendance or reimburse students for certain expenses they paid for out-of-pocket. Members have seven years from the end of their term of service to use the awards.

## **Allowable Education Expenses**

If an individual is enrolled in a Title IV eligible program at a Title IV institution of higher education, he or she may use his or her education award to pay for the cost of attending either as a full-time or part-time student. “Cost of attendance” (COA) is a term used by a school’s Financial Aid Office following rules established by the U.S. Congress and the Department of Education.

The COA is the school’s determination of what it will cost a student to go to school for a particular period of time. For a full-time student, it can include tuition and fees, an allowance for books, an allowance for room and board, an allowance for transportation, an allowance for rental or purchase of a computer, and other expenses.

Every Title IV school determines the COA for its students—this is not an amount determined by the member nor by the Trust. This is the amount the school will use to calculate the amount the member is eligible for when completing the Voucher and Payment Request form. The education award can be used to pay that portion of the COA that is not already covered by other sources of financial assistance. A member should be able to find out from the financial aid office what the COA is for a student in a particular program at the school.

Individuals may, however, use the education award to pay for current educational expenses at a Title IV institution of higher education even if the individual is not enrolled in a degree-granting program. For example, an individual may be able to use the education award toward a continuing education course at a Title IV school. As with the cost of attendance, the school will determine what expenses the education award will cover under these circumstances.

Usually, when the school receives the check from the Trust, the school will keep the amount that is due the school (such as tuition, fees, and, if applicable, dorm fees) and will turn over to the student any of the allowances due the student—e.g., the book allowance, transportation allowance, and room and board allowance (if the full-time student is living off campus). This reimbursement is handled in a variety of ways—some schools write the student a check, while others establish an account in the

student's name. The school may also reimburse students for these allowable expenses that were previously paid for by the student, as long as the costs are for "current education expenses."

Members should not take their education award vouchers to bookstores or landlords. Checks can only be made directly to qualified schools (and holders of qualified loans).

### **Education Awards and Taxes**

The IRS has determined that education awards are considered taxable income in the year they are used. If a member uses a portion of an education award in a particular year, only the portion used will be subject to income taxes for that year. If no payment is made from a member's account during a year, there is no tax liability from the award. Likewise, payments the Trust makes for interest that accrued on qualified loans are taxable.

The Taxpayer Relief Act of 1997 created the Hope Scholarship Credit, the Lifetime Learning Credit, as well as a deduction for certain interest payments on qualified student loans. These benefits, which first became available for expenses incurred in 1998, mean that many AmeriCorps members will be able to obtain substantial—in some cases, full-relief from federal taxes on the use of their education awards. The Corporation cannot provide individualized assistance in utilizing these deductions. However, further information about these credits can be obtained from:

- ★ The IRS, [www.irs.ustreas.gov/prod/hot/not97-60.html](http://www.irs.ustreas.gov/prod/hot/not97-60.html); phone: (800) 829-1040. Or request IRS Publication 970, Tax Benefits for Higher Education, by calling
- ★ (800) TAX-FORM ((800) 829-3676) or by downloading it from the IRS website;
- ★ The Department of Education, [www.ed.gov/inits/hope](http://www.ed.gov/inits/hope); or
- ★ AmeriCorps Alums, [www.americorpsalums.org/edtax.html](http://www.americorpsalums.org/edtax.html).

Every January, an IRS form 1099 is mailed to each member who has had interest or education award payments made during the previous year. This notifies members of the amount of miscellaneous income to include on their tax returns. The Trust reports to the IRS all of the payments made on behalf of members for that year. The date the check is issued by the U.S. Treasury (rather than the date requested or the date received) determines the tax year for which the payment is reported.

### **Forbearance**

AmeriCorps members are eligible to have the repayment of certain student loans postponed while they are earning an education award. This postponement—called forbearance—is not automatic. Members must request it from their loan holders with the National Service Forbearance Request Form which can be downloaded from WBRB. The National Service Trust does not grant forbearances; the loan holders do. The Trust merely verifies membership in AmeriCorps and forwards the documents to the loan companies. The Trust is able to verify membership only when it has proof from a project that the individual is an AmeriCorps member.

There are various ways to postpone the repayment of qualified student loans. While members may also be eligible for other types of deferments or forbearances, each with their own special circumstances and limitations, they are encouraged to request forbearance based on national service.

Most qualified student loans that are in default are not eligible for forbearance. For those who have loans that have gone into default before they begin their AmeriCorps service, the member can attempt to negotiate an arrangement with the loan holder (or collection agency) to bring the loan out of default so forbearance can be granted and interest paid.

Under this forbearance, the interest continues to accrue on qualified loans during a member's term of service. Upon the successful completion of their service, the Corporation for National Service will pay, on behalf of the borrower, all or a portion of the interest that accrued during the service period. This benefit is intended to enable an individual with an outstanding debt to participate in AmeriCorps. This is a benefit above and beyond the education award. The interest payment is not deducted from the amount of the award.

Members request Forbearance through the *My AmeriCorps* portal which is available to them once they have been officially enrolled into AmeriCorps through their program and the National Service Trust.

If there are unforeseen delays with the My AmeriCorps portal members may request to use a paper Forbearance Request Form which is available to you online at the WBRs website. The form, which is clearly identified as an AmeriCorps document by the AmeriCorps logo watermarked upon it, is available for download by program officials from the WBRs home page.

### **Qualified Loans**

The AmeriCorps legislation defines a "qualified" student loan as a loan backed by the federal government under Title IV of the Higher Education Act (except PLUS loans to parents of students) or under Titles VII or VIII of the Public Health Service Act. Now, in addition, a provision in the 2002 appropriations law has expanded this definition to include loans that cover all or part of the student's cost of attendance and that are made directly to the student by a state agency.

For purposes of the AmeriCorps education award, the term "state agency" includes state institutions of higher education. Thus, any loan, including short-term loans, made directly to the student by a state institution of higher education is a qualified loan and the student may repay such a loan with the AmeriCorps education award. If a loan is guaranteed by a state agency (such as a state's Higher Education Authority) but is not made by a state agency, the loan is NOT qualified. A qualified loan must be made by a state agency.

The "maker" of every loan should be listed on the loan's Promissory Note. The maker is the entity that originally issued the loan to the student. The maker of the loan does not change, even if the loan is purchased by another loan company. Thus, a promissory note is the best evidence of who originally made the loan. When a loan is refinanced or consolidated a new loan is created. The new loan must meet the definition of "qualified student loan" in order for the payment to be made using the educational award. The original loan no longer exists.

Some of the most common qualified loans are:

- ★ Stafford Loans
- ★ Perkins Loans

- ★ Federal Direct Loans
- ★ Supplemental Loans for Students (SLS)
- ★ Federal Consolidated Loans
- ★ Health Education Assistance Loans (HEAL) Health Professions Student Loans (HPSL)
- ★ Loans made directly to members by a state agency

Members can use their education awards to repay defaulted student loans, as long as the loans meet the definition of "qualified student loan" described above. If you have any questions about whether a loan meets the definition, please contact the National Service Trust at (888) 507-5962.

### **Qualified Schools**

For the purposes of the education award, a “qualified institution of higher education” is an institution that has a Title IV Program Participation Agreement with the U.S. Department of Education. This simply means that the school has an agreement with the Department of Education whereby students at the school are eligible to receive federal financial assistance (backed by the Department of Education under Title IV of the Higher Education Act) to attend the school.

An institution may be fully accredited, even offering graduate degrees. However, unless it is a school that participates in the U.S. Department of Education’s Title IV financial assistance programs—i.e., a “Title IV school”—the education award cannot be used there.

### **Interest Payments**

Members are eligible for interest payments while serving. Below is an outline of how this process works.

Exit information must be entered in WBRS ( or the current electronic exit system required by CNCS) and approved as soon as the member ends his or her service. The information will then be sent to the Trust. The Trust is unable to make an interest payment until it has proof that the member has completed service and has earned an award. Members request interest payment through the *MyAmeriCorps* portal.

Toward the end of the service term (not at the start of service), members should complete an Interest Accrual Form and submit it through the portal. . . The Trust will pay all or a portion of the interest that accrued during the term of service, even if the member made interest payments during his or her service. Remember, the Trust can pay the interest if the qualified loan was placed in forbearance and if the member received an education award for the service.

According to the IRS, in most cases awards are subject to income taxes in the calendar year in which they are used (not earned). Likewise, interest paid by the Trust is subject to income taxes. The Corporation does not withhold taxes, since it does not know the tax bracket the member will be in for that particular year. The Corporation sends members an IRS Form 1099 to be used in preparing income tax returns.

The portion of the interest that the Trust will pay is based on a formula in the Trust’s regulations. That formula takes into account both the number of hours of service and the forbearance (or service) period. Based on the formula, for a member who completes a full-time, 1,700-hour term of service within one

year, the Trust will pay 100 percent of the interest that has accrued. For a member who completes a part-time, 900 hour term of service in one year, the Trust will pay approximately 50 percent of the interest that has accrued. Generally, the longer it takes a part-time member to complete the 900-hour term of service, the smaller the percentage of interest the Trust will pay.

## **MEMBER SUPERVISION**

### **Getting Started Checklist**

✓ **BACKGROUND CHECK.**

Be sure to follow the National Criminal Background check requirements, including a NSOPR. Applicants who fail the NSOPR check cannot be offered a position with your program. See: [http://www.nationalservice.org/for\\_organizations/manage/history\\_checks.asp](http://www.nationalservice.org/for_organizations/manage/history_checks.asp)

✓ **CHILD CARE**

Call AmeriCorps Care at 800-570-4543 to request a program director's packet. Program Directors must verify the eligibility of members to receive child care.

✓ **DOCUMENTATION OF CITIZENSHIP**

Read from the list of accepted documents. Require members to bring the items necessary. Make a copy and place in member's file

✓ **ENROLLMENT FORM**

Have each member complete and sign a National Service Trust Enrollment Form. Keep the signed original in member's file and complete the online version in WBRS. WBRS automatically submits the form to the National Service Trust. (<http://wbrs.net>). These procedures may change as WBRS is retired and enrollment is implemented through the *MyAmeriCorps* portal. The Commission will keep you informed as these procedures change and are implemented.

✓ **FORBEARANCE REQUEST FORM**

Forbearance should be requested through the *MyAmeriCorps* portal by the individual member. If necessary members may use the federal Loan Forbearance Request form to request the postponement of repayment of qualified loans.

✓ **HEALTH INSURANCE**

Make sure you have health insurance for all eligible members.

✓ **MEMBER CONTRACT**

Before members begin their service they must sign a member contract that is specific to their program. Many programs go over the contract at the orientation. The contract **MUST** be signed on or before members begin their first day of service. One copy should go to the member and an original copy should be kept in the member's file.

✓ **GRIEVANCE PROCEDURES**

A signed copy of the grievance procedures should be included on each member file

✓ **MEMBER FILES**

Documentation of member information is an essential part of record keeping, creating a system at the beginning of the year will help you in quickly accessing the data you need. Members must be allowed to access their files through a written request protocol.

✓ **SERVICE GEAR**

AmeriCorps service gear should be ordered from Mississippi Industries for the Blind well ahead of the service year

## **Member contracts**

The member contract is the document that will explain to a member his or her responsibilities and rights as an AmeriCorps member in a specific program.

Refer to the sample contract at the back of this document to create a contract tailored to meet the specifications of your individual program.

### Required Components of a Member Contract

We expect that you will create a member contract that is specific to your program and which includes at least the following:

- a. Member position description;
- b. The minimum number of service hours (as authorized by statute) and other requirements (as developed by the grantee) necessary to successfully complete the term of service and to be eligible for the education award;
- c. Standards of conduct, as developed by the grantee or sub-grantee;
- d. Prohibited activities, including those specified in the regulations;
- e. Requirements under the Drug-Free Workplace Act (41 U.S.C. 701 *et seq.*);
- f. Suspension and termination rules;
- g. The specific circumstances under which a member may be released for cause;
- h. Grievance procedures;
- i. Terms of Service (Dates)
- j. Authorizations (Signatures – Program staff and Member)
- k. Other requirements as established by the grantee.

## **Grievance Procedures**

You must explain to your members the grievance procedures of your program and have a signed copy acknowledging the member's understanding of these procedures. Your grievance procedure must include a hearing and binding arbitration as explained below.

### *Overview*

If informal efforts to resolve disputes are unsuccessful, AmeriCorps members, labor unions, and other interested individuals may seek resolution through a grievance procedure. AmeriCorps grievance procedures may include an optional component-alternative dispute resolution. The procedures must include a hearing and binding arbitration.

The grievance procedure is not designed to address all issues. Allegations of fraud and criminal activity must be reported immediately to the Corporation's Inspector General. Allegations of

discrimination should be directed in writing to the Corporation's Office of Equal Opportunity. However, it is designed to address most disputes between members and their programs, as well as grievances from labor unions and other interested individuals.

Grievance procedure requirements are published in the Corporation's statute (42 U.S.C. § 12636) and regulations (45 C.F.R. § 2540.230). They are summarized as follows:

### *Required grievance procedures*

By law, a program must provide a grievance procedure to resolve disputes filed by AmeriCorps members, labor unions, and other interested persons (including AmeriCorps member applicants). The grievance procedure must include a hearing and binding arbitration.

**Grievance hearing:** By law, programs must provide an opportunity for a grievance hearing, provided that a request is made within one year of the matter at issue. Hearings must be held no later than 30 calendar days after the filing of the grievance, and a decision must be made no later than 60 calendar days after the filing of the grievance. Hearings must be conducted by a person who has not participated in any previous decisions concerning the issue in dispute.

**Binding arbitration:** By law, programs must provide an opportunity for binding arbitration in the event a grievance hearing decision is adverse to the aggrieved party or if no decision is made within 60 days of the filing of the grievance. The arbitrator must be independent and selected by agreement of the parties. If the parties cannot agree on an arbitrator, the Corporation's Chief Executive Officer will appoint one within 15 calendar days after receiving a request from one of the parties.

An arbitration proceeding must be held no later than 45 calendar days after the request for arbitration, or no later than 30 calendar days after the appointment of an arbitrator by the Corporation's CEO. An arbitration decision must be made no later than 30 calendar days after the commencement of the arbitration proceeding.

The cost of arbitration must be divided evenly between the parties, unless the aggrieved party prevails, in which case the program must pay the total cost of the proceeding as well as the prevailing party's attorneys' fees. A law suit to enforce an arbitration award may be brought in any federal district court having jurisdiction over the parties.

The following exhibit illustrates the timeframes that must be addressed in an AmeriCorps grievance procedure. Not every requirement is shown, but all major milestones are noted.

### *Timeline for Grievance Procedures*

- ★ within 1 year of alleged occurrence: GRIEVANCE FILED
- ★ within 30 days of filing of grievance: HEARING
- ★ within 60 days of filing of grievance: DECISION
- ★ if decision is adverse to grievant, or 60 days after filing grievance if no decision has been reached: REQUEST FOR BINDING ARBITRATION
- ★ within 45 days after request for arbitration, or within 30 days after CEO appoints arbitrator: BINDING ARBITRATION HEARING

- ★ within 30 days of arbitration hearing: BINDING ARBITRATION DECISION

A Model Grievance Procedure is presented in the Appendix of this book.

### **Prohibited Activities**

There are certain activities—including lobbying, political, religious, or advocacy activities—that AmeriCorps members and staff may not perform in the course of their duties, while charging time to the AmeriCorps program, or at the request of program staff. Furthermore, members and staff may not engage in any conduct in a manner that would associate the national service program or the Corporation with the prohibited activities. Programs must become familiar with the specific prohibitions described in the Corporation’s formal regulations (45 C.F.R. §2520.30) and the grant provisions.

### **Drug Free Workplace Act**

Programs receiving federal funds must follow the Drug Free Workplace Act and publish a drug-fee workplace statement. In addition, the Federal regulations require that you establish an on-going drug free awareness program for employees. Members are required to follow the Drug Free Workplace Act which should be mentioned during orientation and in the member’s contract.

### **Guidelines for Fundraising by members**

In general, AmeriCorps members cannot assist their organizations with major fundraising efforts. However, Corporation policy permits some limited activities related to fundraising by AmeriCorps members to the extent that such activities:

- ★ provide immediate and direct support to a specific and direct service activity;
- ★ fall within the program’s approved direct service objectives;
- ★ are not the primary activity of the program;
- ★ and do not involve significant amounts of time for any member.

*For example, members may:*

- ★ organize an occasional “serv-a-thon” in which members recruit individuals to obtain sponsor in advance of an approved direct service event.
- ★ solicit supplies from local businesses for a direct service project—e.g., solicit several cans of paint from a store near a work site to meet a need.

*Members may not:*

- ★ prepare any part of a grant proposal or perform other fundraising functions to help you achieve your match requirement, or to pay your organization’s general operating expenses.

Member hours spent on fund raising must be tracked on their time logs and may not exceed 10% of their hours. The hour’s limitation is per member specific limitation. The following is information from the AmeriCorps rules regarding fundraising:

### **2520.40 Under what circumstances may AmeriCorps members in my program raise resources?**

(a) AmeriCorps members may raise resources directly in support of your program's service activities. (b) Examples of fundraising activities AmeriCorps members may perform include, but are not limited to, the following: (1) Seeking donations of books from companies and individuals for a program in which volunteers teach children to read; (2) Writing a grant proposal to a foundation to secure resources to support the training of volunteers; (3) Securing supplies and equipment from the community to enable volunteers to help build houses for low income individuals; (4) Securing financial resources from the community to assist in launching or expanding a program that provide social services to the members of the community and is delivered, in whole or in part, through the members of a community-based organization; (5) Seeking donations from alumni of the program for specific service projects being performed by current members. (c) AmeriCorps members may not: (1) Raise funds for living allowances or for an organization's general (as opposed to project) operating expenses or endowment; (2) Write a grant application to the Corporation or to any other Federal agency.

### **2520.45 How much time may an AmeriCorps member spend fundraising?**

An AmeriCorps member may spend no more than ten percent of his or her originally agreed-upon term of service, as reflected in the member enrollment in the National Service Trust, performing fundraising activities, as described in § 2520.40.

### **Evaluating Member Performance**

The grantee must conduct and keep a record of at least a midterm and end-of-term written evaluation of each member's performance for Full and Half-Time members and an end-of-term written evaluation for less than Half-time members. The evaluation should focus on such factors as:

- a. Whether the member has completed the required number of hours;
- b. Whether the member has satisfactorily completed assignments; and
- c. Whether the member has met other performance criteria that were clearly communicated at the beginning of the term of service

### **Member Safety**

Under the Provisions, programs must have appropriate safeguards in place to ensure the safety of members. Further, members may not participate in projects or undertake service activities that pose a significant safety risk. The Corporation does not have a specific safety procedure that programs must follow. Programs should establish appropriate policies related to the supervision of members and provide specific training to minimize risks to members. In addition, programs should avoid placing members in situations where they will witness crimes, get involved in the arrest process or handle legal evidence.

### **Voting**

Programs should encourage eligible members who are unable to vote before or after service hours to do so during their service time without incurring any penalties. The site director should determine the acceptable length of absence. For example, many federal and state employers allow their employees to take leave with pay for up to three hours after the polls open to enable them to vote in person.

### **Release of a Member**

Programs may release members for:

- Compelling personal circumstances; or
- Cause

## **Releasing a Member for Cause**

*A release for cause encompasses any circumstances other than compelling personal circumstances that warrant an individual's release from completing a term of service.* These could include anything from disciplinary removals pursuant to the program's contract with the member, to the member's decision to leave for any reason that is not a compelling personal circumstance. The term "for cause" does not necessarily have the same meaning as under traditional employment law. Any reason for leaving other than compelling personal circumstances is for cause under the National and Community Service Act of 1990 as amended. Please review the Corporation's regulations (45 C.F.R. § 2522.230) for a more detailed discussion on releasing a member for cause. AmeriCorps programs must release for cause any participant who is convicted of a felony or the sale or distribution of a controlled substance during a term of service.

What are the consequences of releasing a member for cause?

- ★ The member will not receive any portion of the education award or any other payment from the National Service Trust, including loan forbearance.
- ★ An individual who is released for cause must disclose this fact in any subsequent applications to participate in an AmeriCorps program. Failure to do so disqualifies the individual for an education award, regardless of whether the individual completes a term of service.

You must immediately notify your granting agency, the National Service Trust, health care provider, and, if the member is receiving child care, the National Association of Child Care Resource and Referral Agencies (NACCRRA) if you release a member either for compelling personal circumstances or for cause.

In every case where a member leaves a program, you must submit exit information to the Trust using WBRS. WBRS will automatically prompt users to provide justification for early release. The director's reasons for the determination should be as specific and detailed as possible, and should be consistent with the regulations and grant provisions as noted.

## **Releasing a Member for Compelling Personal Circumstances**

If a member wants to leave the program, the member has the primary responsibility for demonstrating that compelling personal circumstances prevent him or her from completing the term of service. You have the authority to determine whether or not the member's reason for leaving is a "compelling personal circumstance."

Programs must document the basis for any determination that compelling personal circumstances prevent the member from completing the term of service. (Program directors should carefully review the detailed procedures specified in the Corporation's regulations (45 C.F.R. § 2522.230) and the AmeriCorps grant provisions.)

Consequences of releasing a member for compelling personal circumstances:

- ★ A participant who is released for compelling personal circumstances and who has completed at least 15 percent of the required term of service is eligible for a pro-rated education award.

- ★ As an alternative to releasing a participant, the program may, after determining that compelling personal circumstances exist, suspend the participant’s term of service for up to two years (or longer if approved by the Corporation based on extenuating circumstances) to allow the participant to complete service with the same or a similar AmeriCorps program at a later time.

### **Suspending a Member**

You may grant permission for a member to leave your program for a “compelling personal circumstance,” and suspend his or her term of service for a period of up to two years. When the member leaves the program, you must notify your state commission, parent organization, or Corporation Trust Office (for Tribes and Territories) within 30 days of the suspension. If the member was enrolled via WBRS, you should make the change in WBRS.

### **Transferring a Member**

With restrictions a commission, parent organization, or Corporation Program Officer may grant permission to transfer a member to another AmeriCorps\*State or AmeriCorps\*National program. Note that members may not transfer across different streams of service. For example, a member may not transfer from an AmeriCorps\*State or \*National program to an AmeriCorps\*VISTA position or to AmeriCorps\*NCCC. The WBRS On-Line Help Manual contains instructions for transferring a member enrolled in WBRS.

- ★ Program A must first determine that compelling personal circumstances warrant a transfer. Prior to initiating a transfer, Program A must obtain from its commission, parent organization or CNCS Program Officer (for Tribes and Territories) written confirmation that valid compelling circumstances support transfer and written approval to complete the transfer.
- ★ The member must apply to and be accepted to Program B, which must have an available slot in the incoming class (this means the program is able to provide a full term of member support costs and an education award).
- ★ No funds can be transferred from Program A to Program B. The director of Program A must send hard copies of all time logs for the member to Program B.
- ★ Follow instructions from your CNCS Program Officer to ensure that all required steps for transfer are followed.
- ★
- ★

### **Replacing a Member**

AmeriCorps members who leave their position before completing 15% of their service hours are not eligible to receive an Education Award. If you have fully enrolled your awarded member slots, you may replace any member who terminates service before completing **30%** of his or her term without receiving a pro-rated education award.

The program must have the funds available to support a replacement. The Commission should be contacted before this re-fill process begins. Slots that are re-filled cannot be re-filled a second time.

## **PROGRAM MANAGEMENT**

### **Web based reporting system (WBRs)**

At this time members must be enrolled and exited through the WBRs system. CNCS is in the process of implementing new capacity for the *My AmeriCorps* portal which may change this procedure. Your Commission will keep you informed as these changes occur.

You are still required to track member hours through signed timesheets, however these do not need to be reported through the WBRs system. Your Commission will explain requirements regarding reporting members' hours.

### **AmeriCorps progress reports (APR)**

AmeriCorps programs are required to submit AmeriCorps Progress Reports at least annually. Progress reports monitor a program's progress toward meeting its annual program performance measures, assess program strengths and challenges, and highlight unique program/member achievements. The Commission expects that all progress reports are thoughtfully constructed in such a way that provides an accurate reflection of the program's accomplishments and challenges for the reporting period. At a minimum, programs must ensure that:

- All questions are answered;
- Program impact is clearly stated;
- Challenges are clearly outlined; and
- Measures to address challenges, improve the program, and/or comply with federal laws and regulations are clearly identified.

### **Financial status reports (FSR) and periodic expense reports (PER)**

Financial Status Reports (FSR) must be submitted to the Commission each quarter on or before the due date. If the due date falls on a weekend then they would due on the next business day, excluding holidays.

### **Member orientation**

Member orientations are necessary for preparing your members to begin their terms of service.

In order to facilitate this learning process, programs are strongly encouraged to present materials in multiple formats. In particular, program rules, including prohibited activities, should be presented orally as well as in writing, with opportunities for discussion and questions.

Core topics for initial member orientation should include, at a minimum:

- National service: the big picture
- Give an overview of the history and nationwide importance of national service by reviewing:
  - ❖ The history of service in America
  - ❖ The AmeriCorps network of over 900 programs and more than 50,000 members

- ❖ A discussion of the AmeriCorps ethic
- ❖ The importance of getting things done
- ❖ The meaning of community
- ❖ The doors of opportunity that will open through service
- ❖ The responsibilities that individuals have to themselves, their families, their community, and the nation
- Program rules, regulations, and benefits
- Distribute the member guide and discuss sections such as:
  - ❖ Drug Free Workplace Act Sexual harassment and other discrimination issues
  - ❖ Grievance procedure
  - ❖ Safety protocol
  - ❖ Prohibited activities
  - ❖ Rules of conduct
  - ❖ Suspension
  - ❖ Making up missed service hours
- Program operating policies:
  - Timesheets (signed by member and supervisor)
  - Travel policies
  - Expense reimbursement
  - Benefits
  - Living allowance
  - Staff and member roles
- The objectives of the program and how to collect data for evaluation purposes
- Background information about the community or natural environment.

Orientation sessions for your staff, site supervisors, and members should include a discussion on the national scope of AmeriCorps. The orientation should also include an explanation of how your local program fits into the AmeriCorps network of national service programs.

### **AmeriCorps Pledge**

During the orientation, at the completion of pre-service training, or at another appropriate point, members should be asked to take the AmeriCorps pledge:

*I will get things done for America—to make our people safer, smarter, and healthier.*

*I will bring Americans together to strengthen our communities.*

*Faced with apathy, I will take action.*

*Faced with conflict, I will seek common ground.*

*Faced with adversity, I will persevere.*

*I will carry this commitment with me this year and beyond.  
I am an AmeriCorps member, and I will get things done.*

Copies of the AmeriCorps pledge, suitable for distributing to members as a certificate, are available from Mississippi Industries for the Blind.

### **Member training**

Programs are required to provide members with the training, skills, and knowledge they need to perform well in their assigned service project. Training should be an ongoing part of your program. You should use service experiences to help members improve their skills, internalize project goals and increase their insight. In addition, training should reinforce AmeriCorps information, including prohibited activities.

Programs as a whole must allocate at least 80 percent of the required participation to direct service activities and no more than 20 percent of the aggregate required service hours to education, training, and other non-direct service activities. This rule applies to programs as a whole and not to individual members. Thus, there can be minor differences among members in how much time they spend in non-direct service activities. However, members should not be assigned to administrative duties unless incidental to the service activities.

#### Examples of training for assigned service activities:

- ★ skills training (such as tutoring, mentoring, giving immunizations, etc.)
- ★ working with volunteers
- ★ cross-cultural sensitivity
- ★ team building

Examples of training to develop members (these are suggested topics—each program will determine their own training needs):

- ★ citizenship training
- ★ cross-cultural sensitivity
- ★ communication
- ★ accommodation of persons with disabilities
- ★ conflict resolution
- ★ resume writing
- ★ CPR/first aid
- ★ life after AmeriCorps

### **National Service Days**

Throughout the year, AmeriCorps members should have opportunities to come together for special events related to their service. This will remind them that they are part of a national network of programs, celebrate their accomplishments, and allow them to work with community volunteers, other

AmeriCorps members and other national service participants such as Learn and Serve America students and volunteers in the National Senior Service Corps. Some events are designed to engage the broader community and leverage the work of unstipended volunteers. events include:

- ★ Martin Luther King, Jr. Day of Service (January 15,2007)
- ★ Ceasar Chavez Day, March 31
- ★ National AmeriCorps Week – second week of May
- ★ National Volunteer Week – fourth week of April
- ★ National Youth Service Day
- ★ Make A Difference Day - fourth Saturday of October

### **Member files**

You should create a file for each one of the members participating in your program. In the file you should keep documentation about your member's application, eligibility, contact, time sheets, reflecting service hours, performance evaluations, grievance procedures, exit forms and all other relevant information about your members. Files should be kept in a manner which ensures confidentiality.

You must be able to show that every member was eligible to enroll in AmeriCorps and to receive in-service benefits and an education award upon completion of the term of service. You are required to certify each member's enrollment, number of hours of service performed, and completion of a term of service. Your records must show that a member performed the hours of service included on the certification, and that the member completed the term of service required in his or her contract.

Supervisors and program directors should conduct periodic reviews of member files to ensure that service hours are being accurately tracked and that member files are current and complete. Moreover you must develop record retention policies and procedures that meet the requirements of the grant provision and your grant agency.

To document eligibility you should keep records on the member's

- ❖ Citizenship or lawful permanent resident status
- ❖ Birth certificate
- ❖ Social Security number
- ❖ Enrollment form with signed certification by member regarding the highest level of education achieved, age, citizenship;
- ❖ Documentation of personal compelling circumstances
- ❖ Hours of service (supported by timesheets and signed by the member and their supervisor)
- ❖ Criminal Background data may be maintained in the member file or in a separate secure, confidential location.

\*Keep in mind that auditors want a document that they can touch as opposed to the document being stored electronically.

You should also keep official members files including each member's:

- Signed application form
- Signed member contract
- Position description
- Performance evaluations
- Documentation of disciplinary action
- Sites agreements
- Signed grievance procedures
- Proof of health insurance coverage (or waiver); publicity release (with refusal option); emergency contact sheet ; authorization to conduct a criminal background check (if necessary); member safety plan

### **Exiting a Member**

Members should complete and sign the National Service Trust End of Term Form. Keep the signed original in the member's file and submit the online version in WBRS. Once the exit has been downloaded by the Trust, the member will have access to their Education Award through the *MyAmeriCorps* portal.

### **Site Visits**

AmeriCorps programs should expect site visits from the staff of the Commission and possibly even Corporation staff. All visits are coordinated with program staff. Site visits allow staff to learn more about program service activities and community partnerships; and to ensure compliance with Corporation and state regulations, policies and grant provisions; to monitor the progress of a program toward meeting Performance Measures and to provide technical assistance to improve the quality of the program.

## ***FISCAL MANAGEMENT***

### **Setting Up Financial Systems**

The grant award and its provisions contain many of the details and specifics governing the management of your grant. Your organization's financial officer and accountant should be familiar with the more detailed financial and management requirements contained in Corporation regulations, the grant and the applicable Office of Management and Budget (OMB) Circulars.

In order to effectively manage and implement your program, program directors need to be familiar with the principal requirements applicable to the AmeriCorps program, such as member recruitment, training, prohibitions on lobbying, terms of service, minimum hours, etc. In addition, you should be

familiar with the special limitations on use of funds that apply to AmeriCorps, such as the 5 percent limitation on federal funds for administrative costs.

### **The basics of a good financial management system**

To build a good financial management system, programs must use standard accounting practices with general ledgers and similar books of record, supported by source documentation that establishes a clear audit trail. The financial reports must lead back to the ledgers and source documents clearly. Since you, as the program director, are responsible for the overall administration of the program, you should take an active role in understanding and monitoring the financial systems.

Programs must document the member hours through time and attendance records. You must have individual time distribution records for your staff who will be charged to the grant (in whole or in part) that allow you to identify all of their time and that segregate costs chargeable to the grant (distinguishing between administrative and programmatic functions) and costs not chargeable to the grant (such as fundraising). Grantees must segregate the financial duties in the office to the extent possible (for example, having one person sign the checks and another reconcile the bank statement). The organization must track specifically all property purchased with federal funds.

The checklist below will help you organize and fulfill your fiscal duties:

### **Checklist for Setting Up Financial Systems**

#### **\_\_\_ SET UP AMERICORPS ACCOUNT**

The AmeriCorps account must be a separate account or have a separate account number. All Corporation grant awards must be tracked separately.

#### **\_\_\_ WBRs ACCESS**

To set up a WBRs account for an employee send your grants officer with the Commission an email including the following information: employee name, phone number, email address, and whether or not they should have access to approve member forms.

#### **\_\_\_ TRACKING IN-KIND SERVICES**

You are responsible for tracking in-kind services from partners and from your own agency. This includes donated items as well as staff time.

#### **\_\_\_ TRACKING CASH MATCH**

A system must be developed to track your cash match. Your program is expected to meet your match.

#### **\_\_\_ DISBURSEMENT OF STIPENDS**

Members must receive their stipends in equal installments over the term of service. The stipend is not dependent on the number of hours worked in any service period.

However, situations in which a member serves zero hours during a pay period should be very rare and the member should be suspended if there are periods in which no service is performed. Otherwise, since the living allowance is to be distributed evenly over the service period, it should be paid regardless of the number of hours. However, a member's contract could also stipulate conditions under which the living allowance is paid and what the member should do if a period occurs in which no hours are served. The contract could also stipulate the minimum number of hours required during each service period.

## **OMB Circulars**

The OMB circulars cited in your grant address many of the details and specifics governing the management of a federal grant. If your organization has had other federal grants, it should already be familiar with the content. If not, your organization needs to familiarize itself with the circulars. If you have any questions, contact the grants officer assigned to your grant.

## **Common Problems**

If your organization does not comply with the grant provisions and OMB requirements, costs that have been charged to the grant can be questioned or disallowed following an audit. If a program's financial management system is seriously inadequate, the granting agency or the Corporation can stop making reimbursement request payments, suspend funds, terminate the grant, recover funds, or take other legal steps.

Some of the most common problems are:

- ★ inadequate accounting practices;
- ★ poor internal controls;
- ★ inadequate documentation and record-keeping;
- ★ inaccurate financial status reports; and
- ★ undocumented matching contributions, particularly in-kind.

## **Allowable Costs**

In general, a cost is allowable if it meets the following criteria:

- ★ It is reasonable and necessary for the performance of the grant award.
- ★ It conforms to the limitations and exclusions in the award as to types or amounts of cost items.
- ★ It is consistent with the policies and procedures of the grantee organization.
- ★ It is accorded consistent treatment.
- ★ It is documented adequately.

## **Taxes**

Most programs are required to pay FICA. Under federal law, the FICA payment rate is 15.3 percent of the living allowance. Half (7.65 percent) is paid by the program and half is deducted from the member's living allowance. FICA payments cover Social Security and Medicare benefits. If this is included in your approved grant budget, programs may charge up to 85 percent of the Corporation's share of FICA against the grant.

## **Withholding Income Taxes**

Under federal tax laws, ordinary income tax rules apply to member benefits. A living allowance is taxable as "compensation for services" and generally is subject to federal withholding. Room and board also may count as income subject to withholding, even though the members do not receive cash. Low-income members may be able to claim an exemption from withholding if (1) they had no tax

liability in the previous year, and (2) they expect to have no tax liability in the current year. State income tax withholding laws also apply.

Like all personal income taxes, taxes on the living allowance are the responsibility of the individual member. Members must complete a W-4 form at the start of the term of service. At the end of the tax year, programs must provide members with a W-2 form.

## **Match Requirements**

### Cost Matching Requirements for AmeriCorps Programs

You are responsible for meeting the matching amounts in your negotiated grant award and budget. This amount based on your proposal may exceed the minimum match required.

#### **Valid documentation of match includes:**

- ★ Donations, letters/statements of costs that show the type of donation, value and frequency;
- ★ time and effort forms or others that show contribution of time to program by staff;
- ★ In kind receipt/voucher forms;

#### **Acceptable Sources of In-Kind Contributions –Examples:**

- ★ Professional Services
- ★ Hold Meetings in donated space
- ★ Public service announcements
- ★ Recognition events

## **Fundraising Rules for Program Staff**

While there are a wide range of activities you may undertake to create a sustainable future for your program, you should keep in mind that certain activities cannot be paid for out of federal grant funds. Before making plans, you should review the Office of Management and Budget (OMB) circular applicable to your organization that spells out the costs that may and may not be charged to your grant. For example, under the OMB circulars, you cannot charge to your grant the costs of “organized fundraising” or expenses incurred “solely to raise capital or obtain contributions.” Staff supported by AmeriCorps grant funds must comply with the OMB limitations while on AmeriCorps time, or not charge the time spent on these activities to the AmeriCorps grant. OMB circulars also require that you keep accurate records regarding time spent on these and your other activities to clearly convey the nature of the activities undertaken.

In general, AmeriCorps members cannot assist their organizations with major fundraising efforts. However, Corporation policy permits some limited activities related to fundraising by AmeriCorps members to the extent that such activities:

- ★ provide immediate and direct support to a specific and direct service activity;
- ★ fall within the program’s approved direct service objectives;
- ★ are not the primary activity of the program; and
- ★ do not involve significant amounts of time for any member.

Following are some examples that will help to clarify what you can do with federal grant funds, as well as what you cannot charge to your AmeriCorps grant. Also included are examples of what AmeriCorps members may do, as well as activities that are prohibited for members.

Program staff may:

- ★ Develop and print materials such as brochures and annual reports to be used for outreach to the general public, which includes potential board members, funders, and community partners.
- ★ Contact individuals and organizations that are potential partners who may assist your program in delivering services.
- ★ Ask your board of directors and other volunteers to raise funds on their own time.
- ★ Pay for a program evaluation to demonstrate the impact and effectiveness of your program.
- ★ Solicit community involvement with or in-kind support for your program—e.g., seek volunteers to help with a project and donations of building supplies for a construction project.
- ★ Coordinate community involvement in a day of service, serv-a-thon, and other direct service activities that may have a fundraising element.
- ★ Include members of the public (including funders and other community partners) on your general mailing list for newsletters or brochures and other general interest publications. (Publications paid for from AmeriCorps grant funds, including matching or other federal funds, should not contain solicitations of donations).
- ★ Include in your general-purpose newsletter a “wish list” of needed in-kind items.
- ★ Invite members of the public, including funders, to make a site visit to your program.
- ★ Ask for advice from individuals with expertise who may be business or foundation staff regarding matters such as program development, training, and evaluation.
- ★ Invite members of the public, including funders and other community partners, to attend graduation ceremonies and other special events.
- ★ Ask a local business to sponsor a recognition event for members or volunteers.

Program staff may not:

- ★ Use AmeriCorps grant funds, including matching or other federal funds, to develop promotional materials solely targeted at prospective funders.
- ★ Use AmeriCorps grant funds, including matching or other federal funds, to engage in a direct mail campaign to raise funds.
- ★ Use AmeriCorps grant funds, including matching or other federal funds, to conduct capital campaigns or endowment drives.
- ★ Hire a development consultant and charge fees to your AmeriCorps grant.

- ★ Charge time spent by staff on fundraising to sources of AmeriCorps or other federal grant funds.

#### Members may:

- ★ Solicit supplies from local businesses for a direct service project—e.g., solicit several cans of paint from a store near a work site to meet a need.
- ★ Organize an occasional “serv-a-thon” in which members recruit individuals to obtain sponsors in advance of an approved direct service event.

#### Members may not:

- ★ Prepare any part of a grant proposal or perform other fundraising functions to help you achieve your match requirement, or to pay your organization’s general operating expenses.

### **Grant Modifications**

#### **Changes in the grant that do not involve the budget**

Examples of program changes that require prior written approval of the granting agency:

- ★ changes in the scope or goals of the program;
- ★ changes in the start and end dates of a grant;
- ★ decisions to sub-grant or sub-contract out AmeriCorps activities not previously contemplated or approved;

#### **Changes in the grant that do involve the budget**

Examples of program changes that require prior written approval of the granting agency:

- ★ Purchases of equipment over \$5,000 unless specified in the grant award budget.
- ★ Transferring funds from one budget category to another.
- ★ Moving budget from Member Support costs to Program Operating costs.

### **Retention of Grant Records**

In general, you must keep all records for a period of three years or more from the date of submission of the appropriate final financial status report for the period. If an audit is started prior to the expiration of the three-year period, the records must be retained until the audit findings involving the records have been resolved and final action taken. **More details are available in 45 CFR § 2541.420.**

### **Audit Requirements**

Recipients of federal grant awards who spend \$500,000 or more in total federal awards are required to have audits performed in accordance with OMB Circular A-133. OMB Circular A-133 can be found at [www.whitehouse.gov/omb/circulars/a133/a133.html](http://www.whitehouse.gov/omb/circulars/a133/a133.html).

## **A-133 Audit**

When applicable, an A-133 audit requires that you have an audit of your entire organization conducted by an independent auditor that essentially determines:

- ★ if your organization's financial statements present its and the program's financial position fairly;
- ★ if the institution has the internal control structure to ensure that the program is managing the award in accordance with the applicable federal laws and regulations; and
- ★ that the program has complied with the applicable laws and regulations that may have a direct and material effect on the program's financial statement.

For clarification on these and any other financial management issues, you should contact your state commission or parent organization. Direct grantees should contact the Corporation's Office of Grants Management.

## **The Role of the Office of the Inspector General**

The Corporation's Office of the Inspector General (OIG) is an independent and objective office established to help improve the Corporation's programs and operations (including AmeriCorps). The OIG has the responsibility of keeping the Corporation's Chief Executive Officer and the Congress informed about problems and deficiencies relating to the Corporation's programs and operations. The OIG carries out this role by conducting and supervising audits and investigations that promote economy and efficiency, and prevent and detect fraud, waste, and abuse, in the Corporation programs and operations. The OIG is authorized by statute to have full access to all records, reports, and other available material in conducting its work. The OIG also coordinates the Corporation's relationships on matters of fraud, waste and mismanagement with other organizations, including federal, state and local law enforcement agencies.

## **When to contact the Office of the Inspector General**

You should promptly contact the Office of the Inspector General whenever someone in your program discovers information that indicates there might have been waste, fraud, or abuse, or any violation of criminal law at your program or program site. The OIG accepts confidential referrals of information.

Written notifications should be submitted to:

Office of the Inspector General  
Corporation for National and Community Service  
1201 New York Avenue, N.W. Washington, D.C. 20525

The OIG can also be reached by calling (202) 606-5000, ext. 390, or its toll-free hotline, (800) 452-8210.

## **Closeout Process**

Grant Close-out as outlined in the AmeriCorps Provisions, grant close-out begins within 90 days after the end of the project period. It is important that all of the activity of the grant has concluded and all members have completed their service. In order to formally close out a grant, all of the subgrants

awarded must also be closed. For instance, in order to fully close out the competitive award to a state, all of the grantees funded through that competitive award must first be closed.

CNCS' own grant close-out requirements

can be found at: [http://www.americorps.org/forms/06\\_1204\\_ac\\_lsa\\_closeout.pdf](http://www.americorps.org/forms/06_1204_ac_lsa_closeout.pdf)

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*Caution:* Federal law requires that all grant and program documentation must be maintained for three years after final close-out date. It is important to note that the three years referred to relates to the Commission's or National Program's close-out with CNCS, not the grantee's or operating or service site's close-out with its State Service Commission or National Program

## TRAINING AND TECHNICAL ASSISTANCE

### General Information

The Montana Commission on Community Service is committed to providing quality assistance to AmeriCorps programs in the state. In addition to coordinating several training events annually, the Commission acts a referral for programs to 1) locate meaningful local, regional, and national training opportunities for both staff and members, 2) partner with other programming in the state to create a collaborative environment where best practices are shared and, 3) provide assistance through scholarships for program staff to attend training events they have identified as being pertinent to their professional development as an AmeriCorps subgrantee.

### Cross-Stream Training Committee

The Montana Cross-Stream Training Committee (CSTC) seeks to increase the effectiveness of its training, expand on the efficiency of training efforts, and build opportunities for cross-stream networking and relationships through the use of a Joint Cross-Program Training Plan. The CSTC includes the Executive Director of the Montana Campus Compact (Higher Education), the Office of Public Instruction's Learn and Serve Director (Learn and Serve K-12), the CNS State Director and State Program Officer (VISTA and National Senior Service Corps), and the Montana State Commission's Executive Director and Program Specialist (AmeriCorps\*State). The Montana Commission on Community Service staffs the Partnership. The purpose of the Cross Stream Training Plan is to identify those training needs that are best addressed by the individual programs and those that can be addressed in collaboration with other programs. The plan is grounded in the State Service Plan which is framed in an assessment and goal-setting context with all National Service partners involved in the process. The State Service Plan assists the committee in identifying specific programmatic areas upon which Montana National Service is focusing, ongoing efforts and initiatives that involve committee collaboration and support said initiatives, and resources, through both local and National programs, that support the collaboration's strategies. The CSTC training plan assists the Corporation for National and Community Service in deploying national training resources in a well planned, cost-effective way while meeting the needs identified through the State Service Plan and the

needs of Montana national service programs. These collaborative efforts strengthen the spirit of volunteerism, enhance civic engagement, and contribute to community service throughout the state.

### **Needs Assessment**

The Commission is strongly invested in working with programs to provide training and technical assistance to strengthen individual programs and succeed as National Service grant recipients. The Commission currently utilizes several strategies to continuously assess the training and technical assistance needs of AmeriCorps programs, the result of which is a dynamic, multifaceted approach that works with programs both collaboratively and individually to address the identified needs. The Commission currently uses the following strategies to identify program training and technical assistance needs:

#### **Online Survey's & Questioners:**

The Commission Training Officer will distribute online surveys and questioners prior to beginning planning for training events. Information solicited is crucial to the planning process and all feedback will be incorporated in a reasonable manner.

#### **Annual In-Depth Assessment:**

Programs are required to complete CNCS' "My Improvement Plan" on an annual basis. "*My Improvement Plan*" is an online tool that helps programs identify the resources they most need to improve their service or volunteer program. The survey questions in "*My Improvement Plan*" are designed to answer training and technical assistance needs for the program or organization. The responses given are based on the degree to which staff believes their program meets the successful characteristic or competency identified in the survey question. Therefore it is not necessary for every staff member to take the survey as it is not an individual improvement plan. However, it may be useful to have different staff members take different sections of the plan (i.e. the fiscal officer should answer the financial management questions).

"*My Improvement Plan*" is a great way for project directors to identify their individual project needs; all responses to the survey are anonymous. CNCS and OCS staff will not be able to review individual responses. However, aggregate percentages for how groups of individuals self-scored on the survey will be provided to State Office and other program staff. The reports will be used by CNCS and Commission staff members to help focus training and technical assistance support. The reports will act as a base-line needs assessment for program types, states or regions. Please contact the Commission Training Officer for more information. **To see the assessment, visit:**

**[www.nationalservice.gov/resources](http://www.nationalservice.gov/resources) and click on "My Improvement Plan".**

#### **Training Evaluation:**

All training and TA activities conducted through the Commission will be evaluated by participants. Information received through the evaluation form is compiled and used when planning future training activities. \*AmeriCorps program staff are welcome to provide feedback and suggestions regarding training activities at any time.

### **Annual Training Calendar for AmeriCorps Programs**

The annual Training Calendar consists of the following activities:

#### **The Community Building Institute (CBI):**

The Community Building Institute consists of eighteen hours of hands on instruction surrounding the basic concepts and philosophies of community organizing and the community building lifecycle. Five trainers from various Montana communities deliver the materials in a series of 1.5 hour sessions over the course of three days. **CBI is generally scheduled twice a year, once in February and once in August.**

#### **All Member Gathering (AMG):**

All Member Gathering is an annual event which brings together all of the AmeriCorps and AmeriCorps \*VISTA members from across the state. The event consists of training surrounding topics on civic engagement, an all member service project, an evening reception, and late night peer trainings. AMG is generally held on Presidents Day and has taken place in different communities. **The event begins around 10 am on Presidents Day and concludes the following morning.** Projects are given the option of using space the morning after to conduct project specific training while everyone is gathered.

#### **Program Directors Training:**

**Held once a year, generally in June or July,** the program directors' training brings all National Service staff together for professional development and networking. The content of the training is developed based upon a yearly needs assessment.

#### **Governor's Conference on Volunteerism and Civic Engagement:**

The annual conference has taken many different directions. Currently, we envision the conference as the premiere event on sustainable volunteerism. We will be offering training on various subjects surrounding volunteerism (recruitment, retention, liability, motivation, etc.) while also bringing all of Montana's various volunteer entities under one roof to discuss strategies for sustainability in the sector. **The Governor's Conference is generally scheduled for the fall.**

#### **AmeriCorps Programs Scholarships:**

The Governor's Commission provides AmeriCorps State program staff with two scholarship opportunities each year. First, each program has the ability to access up to \$500.00 to use toward the professional development of their choice. Second, the commission provides scholarships to cover the registration fee for the annual Montana Non Profit Association conference.

#### **Site Supervisor Training:**

Beginning in 2007, AmeriCorps State site supervisors will be eligible to attend the AmeriCorps \*VISTA site supervisor training. This training focuses on strategies for successful supervision, basic community building principles, and an introduction to National Service.

*\*The only event open to AmeriCorps State members is the All Member Gathering. AmeriCorps State members may attend CBI for a fee (currently \$300). Members are welcome at the Governor's Conference, and will not be charged to attend, but the commission will not cover lodging costs and may or may not cover meals.*

*\*The Commission will cover most meal, lodging and training costs for AmeriCorps State staff to attend the above mentioned events (excluding scholarships). The Commission DOES NOT cover travel expenses.*

## **The National Resource Center**

The National Service Resource Center is one of the AmeriCorps National Training and Technical Assistance providers funded by the Corporation for National Service. The National Service Resource Center (NSRC) is operated by ETR Associates (Education, Training and Research), a national nonprofit health education agency. NSRC serves as a central point for sharing information about effective training and technical assistance (T/TA) resources and other materials relevant to AmeriCorps programs. The Resource Center is your one-stop shop for online tools and training resources to strengthen your volunteer or service program. Sponsored by the Corporation for National and Community Service and administered by ETR Associates, The Resource Center is the central point for:

- Sharing training and technical assistance information among the Corporation's three main programs—Senior Corps, AmeriCorps and Learn and Serve America
- Sharing information with potential grantees to help them apply for Corporation resources
- Providing technical assistance to any organization using volunteers to strengthen local communities

The Resource Center contains online training tools, event calendars, and effective practices, as well as a catalogue of printed publications and videos available on loan. The Resource Center's content is generated by a network of more than 20 training and technical assistance providers funded by the Corporation to serve the needs of volunteer and service programs. In addition, the Resource Center serves as a learning exchange where individual programs can share their innovations and effective practices with others. <http://nationalserviceresources.org/>

## **Project Star**

Corporation for National and Community Service grantees are invited to contact Project STAR to learn how to more effectively measure program performance and plan evaluations. Do you need help understanding the Corporation's performance measurement and evaluation requirements? Do you want to learn more about performance measurement terms, logic models, indicators, data collection instruments, reporting methods and the elements of an evaluation plan?

[http://nationalserviceresources.org/resources/online\\_pubs/perf\\_meas/ac\\_home.php](http://nationalserviceresources.org/resources/online_pubs/perf_meas/ac_home.php)

## **Sample Forms**

Below a couple sample forms used by current AmeriCorps programs. These are intended as samples to guide you in the development of tools unique to your program. Many additional forms may be found with the Commission or at: [http://www.cns.gov/for\\_organizations/tta/forms.asp](http://www.cns.gov/for_organizations/tta/forms.asp)

## ***Model Member Contract for Participation in AmeriCorps***

*(This is provided only as guidance. You must customize this for your program, including dates, service requirements, position description, and discipline codes.)*

### **I. PURPOSE**

It is the purpose of this agreement to delineate the terms, conditions and rules of membership regarding the participation of \_\_\_\_\_  
(hereinafter referred to as the “member”) in the \_\_\_\_\_  
AmeriCorps Program (hereinafter referred to as the “Program”).

### **II MINIMUM QUALIFICATIONS**

The member certifies that he/she is a United States citizen, a United States national or a lawful permanent resident alien and at least 17 years of age (or at least 16 years of age if the member is an out-of-school youth and a participant in one of two types of youth corps defined under the National and Community Service Act of 1990, as amended).

### **III TERMS OF SERVICE**

A. The member’s term of service begins on \_\_\_\_\_ and ends on \_\_\_\_\_. The program and the member may agree in writing to extend this term of service for the following reasons:

1. The member’s service has been suspended due to compelling personal circumstances
2. The member’s service has been terminated, but a grievance procedure has resulted in reinstatement.

B. The member will complete a minimum of 1700 hours (900 hours for half time) of service during this period. (or the exact number of hours your program requires – must be at least 1700 for full time)

C. The member understand that to successfully complete the term of service (as defined by the program and consistent with regulations of the Corporation for National and Community Service) and to be eligible for the education award he/she must complete at least 1700 hours of service and satisfactorily complete pre-service training and the appropriate education. training that relates to the member’s ability to perform service. *{You should customize this section to note any specific training requirements or other service requirements of your program. E.g. CPR, first aid, mediation, and conflict resolution skills and service learning activities.}*

D. The member understands that to be eligible to serve a second term of service the member must receive satisfactory performance reviews for any previous term of service. The member’s eligibility for a second term of service with this program will be based on at least a mid-term and end of term evaluation of the member’s performance focusing on factors such as whether the member has:

1. Completed the required number of hours;
2. Satisfactorily completed assignments, tasks or projects; and

3. Met any other criteria that were clearly communicated both orally and in writing at the beginning of the term of service.

E. The member understands, however, that the mere eligibility for an additional term of service does not guarantee selection or placement.

#### **IV. POSITION DESCRIPTION**

*[In this section, the program should include the position description for the individual member to whom the contract applies. The position description should specify the types of duties, service activities, and assignments the member will be expected to complete.]*

The name of the member's direct supervisor is \_\_\_\_\_.

#### **V. BENEFITS**

A. The member will receive from the program the following benefits:

1. A living allowance while serving up to the amount of \$\_\_\_\_\_
  - a. The living allowance is taxable, and taxes will be deducted directly from the living allowance.
  - b. The living allowance will be distributed [weekly/biweekly] by [direct deposit/check] starting on [date] \_\_\_\_\_. The bi weekly amount will be\_\_\_\_\_.
  - c. The living allowance will only be provided while the member is serving. If a member completes service prior to the defined service period they will not receive any further living allowance.
2. Health benefits (if the member is eligible). The health insurance policy is attached.
3. If applicable, a child care allowance will be provided by the National Association of Child Care Resources and Referral Agencies (NACCRA) directly to the provider, if the member qualifies for the allowance (NACCRA will distribute this allowance evenly over the term of service.)

B. Upon successful completion of the member's term of service, the member will receive an education award from the National Service Trust. For successful completion of a full time term, the member will receive an education award in the amount of \$4,725. For successful completion of a half-time term, the member will receive an education award of [up to \$2,362.50]

1. If the member has not yet received a high school diploma or its equivalent (including an alternative diploma or certificate for individuals with learning disabilities), the member agrees to obtain a high school diploma or its equivalent before using the education award. This requirement can be waived if the member is enrolled in an institution of higher education on an ability to benefit basis or the program has waived this requirement due to the results of the member's education assessment.

2. The member understands that his or her failure to disclose to the program any history of having been released for cause from another AmeriCorps program will render him or her ineligible to receive the education award.

C. If the member has received forbearance on a qualified student loan during the term of service, the National Service Trust will repay a portion or all of the interest that accrued on the loan during the term of service.

D. Members have the right to reasonable accommodations. All AmeriCorps programs shall make reasonable accommodations in practices and/or procedures when the accommodations are necessary. Accommodations are reasonable when they are practical or feasible. The program does not have to provide accommodations that would impose undue hardship on the operation of the program.

## **VI RULES OF CONDUCT**

A. At no time may the member:

1. Engage in any activity that is illegal under local, state or federal law.
2. Engage in activities that pose a significant safety risk to others.
3. Engage in any AmeriCorps prohibited activities that include:
  - Any activity involving attempting to influence legislation or an election or aid a partisan political organization;
  - Helping or hindering union activity
  - Engaging in religious instruction
  - Conducting worship services
  - Providing instruction as part of a program that includes mandatory religious instruction or worship;
  - Constructing or operating facilities devoted to religious instruction or workshop
  - Maintaining facilities primarily or inherently devoted to religious instruction or worship;
  - Engaging in any form of religious proselytization;
  - Organizing or engaging in protests, petitions, boycotts or strikes;
  - Impairing existing contracts for services of collective bargaining agreements;
  - Participating in, or endorsing events or activities that are likely to include advocacy for or against political parties, political candidates, political platforms, proposed legislation, or elected officials;
  - Providing a direct benefit to a for-profit entity, a labor union, a partisan political organization, a religious organization or a non-profit that engages in lobbying.

B. The member is expected to, at all times, while acting in a official capacity as an AmeriCorps member:

*[NOTE: The following are given as examples only. You should customize this section to include all relevant requirements for your programs.]*

1. Demonstrate mutual respect towards others.
2. Follow directions.
3. Direct concerns, problems and suggestion to [*designate the appropriate program official here*].

C. The member understands that the following acts also constitute a violation of the program's rules of conduct:

*[NOTE: The following are given as examples only. You should customize this section to include all relevant requirements for your program.]*

1. Unauthorized tardiness.
2. Unauthorized absences,
3. Repeated use of inappropriate language (i.e. profanity) at a service site.
4. Failure to wear appropriate clothing to service assignments.
5. Stealing or lying.

6. \*\* Engaging in any activity that may physically or emotionally damage other members of the program or people in the community.
7. \*\*Unlawful manufacture, distribution, dispensation, possession or use of any controlled substance or illegal drugs during the term of service.
- 8\*\* Consuming alcoholic beverages during the performance of service activities.
- 9\*\* Being under the influence of alcohol or any illegal drugs during the performance of service activities.
- 10\*\* Failing to notify the program of any criminal arrest or conviction that occurs during the term of service.

*[\*\*Your program may want to have these violations result in immediate termination or something more severe than having them remedied through the progressive discipline system described below. If so, you will need to move them out of this section and add them to the subsection VII(C)(4) below.]*

D. Under the Drug-Free workplace Act, you must notify the Program Director within 5 days if you are convicted under any criminal drug statutes. Your participation in the Program is conditional upon compliance with this notice requirement and we will take action for violation of this.

E. In general, for violating the above stated rules in section VI(C) the program will do the following (except in cases where during the term of service the member has been charged with or convicted of a violent felony, possession, sale or distribution of a controlled substance):

1. For the member's first offense, an appropriate program official will issue a verbal warning to the member.
2. For the member's second offense, an appropriate program official will issue a written warning and reprimand the member.
3. For the member's third offense, the member may be suspended for one day or more and will not receive credit for any service hours missed.
4. For the fourth offense, the program may release the member for cause.

There is no requirement that the Program follow this prescribed sequence in imposing a particular sanction. The seriousness of the occurrence will be considered relevant and violations of the differing rules may be considered as cumulative.

F. The member understands that he/she will either be suspended or released for cause in accordance with paragraphs (B), (C), and (F) of section VII of this agreement for committing certain acts during the term of service including but not limited to being convicted or charged with a violent felony, possession, sale or distribution of a controlled substance.

## **VII RELEASE FROM TERMS OF SERVICE**

- A. The member may be released by the Program from the term of service in the following two ways:
  1. Suspension, as described in paragraphs (F) of this section; or
  2. Termination.
- B. The member understands that he/she may be released for the following two reasons:
  1. For cause, as explained in paragraphs (C) of this section; or
  2. For compelling personal circumstances as defined in paragraph (F) of this section.
- C. The program will release the member for cause for the following reasons:

1. The member has dropped out of the program without obtaining a release from compelling personal circumstances from the appropriate program official;
2. During the term of service the member has been convicted of a violent felony or the sale or distribution of a controlled substance;
3. The member has committed a fourth offense in accordance with paragraph (E) of section VI of this agreement;
4. The member has committed any of the offenses list in [*Youth program may want to add the \*\*violations in section VI(C) 6-10 here or any others you deem appropriate*]; or
5. Any other serious breach that in the judgment of the director of the Program would undermine the effectiveness of the program.

D. The program may release the member from the term of service for compelling personal circumstances if the member demonstrates that;

1. The member has a disability or serious illness that makes completing a term impossible;
2. There is a serious injury, illness or death of a family member which makes completing the term unreasonably difficult or impossible for the members;
3. The member has Military service obligations.
4. The member has accepted an opportunity to make the transition from welfare to work; or
5. Some other unforeseeable circumstance beyond the member's control makes it impossible or unreasonably difficult for the member to complete the term of service, such as a natural disaster, a strike, relocation of a spouse, or the nonrenewal or premature closing of a project or the program.

E. Compelling person al circumstances do not include leaving the Program:

1. To enroll in school;
2. To obtain employment, other than in moving from welfare to work; to
3. Because of dissatisfaction with the program.

F. The program may suspend the member's term of service for the following reasons:

1. During the term the requests a suspension based on compelling personal circumstances as described in paragraph (D) of this section. During the suspension from service, the member will not receive credit for service hours or benefits (as described in Section V). The member may resume his or her term of service once the circumstances supporting the suspension have been resolved. However, a suspension may last no more than two years from the date of suspension. If the member does not resume the term within the two year period, the member may request that the program exit the member and the member will be eligible for a partial education award based on the number of hours served in the term.
2. During the term of service the member has been charged with a violent felony or the sale or distribution of a controlled substance. (If the member is found not guilty or the charge is dismissed, the member may resume his/her term of service. The member, however, will not receive back living allowances or credit for any service hours missed.)
3. During the term of service the member has been convicted of a first offense of possession of a controlled substance. (If, however the member demonstrates enrollment in an approved drug rehabilitation program, the member may resume the term of service. The member will not receive back living allowances or credit for any service hours missed.)

G. The program may suspend the member's term of service for violating the rule of conduct provisions set forth in paragraph (C) of section VI of this agreement.

H. If the program releases the member for cause or for compelling personal circumstance, the member will cease to receive the benefits described in paragraphs (A) and (C) of section V.

I. If the program releases the member for cause the member will receive no portion of the education award. If, however, the program releases the member for compelling personal circumstances, the member will receive a prorated education award, provided the member has completed at least 15 percent of the hours needed to complete the term of service.

J. A term that ends early, either for cause, or for compelling personal circumstances, is still considered a term and the education award that the member receives, or would have been eligible to receive, will count towards the total of two education awards an individual may receive through service with AmeriCorps.

## VIII GRIEVANCE PROCEDURES

A. The member understands that the Program has a grievance procedure to resolve disputes concerning the member's suspension, dismissal, service evaluation or proposed service assignment.

B. The member understands that, as a participant of the program, he/she may file a grievance in accordance with the Program's grievance procedure [*incorporate your grievance procedure into the body of this section*].

## IX AMENDMENTS TO THIS AGREEMENT

This agreement may be changed or revised only by written consent by both parties.

## X AUTHORIZATION

The member and Program hereby acknowledge by their signatures that they have read, understand and agree to all terms and conditions of this agreement. (if the member is under the age of 18 years old, the member's parents or legal guardian must also sign.)

\_\_\_\_\_  
AmeriCorps Member

\_\_\_\_\_  
AmeriCorps Program Director

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name

\_\_\_\_\_  
Name

\_\_\_\_\_  
Date

## ***Model Grievance Procedure***

*(This model is provided to programs as a guide only, and combines provisions that are required by law with optional elements.)*

In the event that informal efforts to resolve disputes are unsuccessful, AmeriCorps members, labor unions, and other interested individuals may seek resolution through the following grievance procedures. These procedures are intended to apply to service-related issues, such as assignments, evaluations, suspensions, or release for cause, as well as issues related to non-selection of members, and displacement of employees, or duplication of activities by AmeriCorps.

### **A. OPTIONAL ALTERNATIVE DISPUTE RESOLUTION (ADR)**

*[The program may choose to include ADR in its grievance as a first option for an aggrieved party. ADR includes mediation or conciliation. This section assumes that the program has chosen to make ADR available.]*

ADR is available, but must be selected within 45 days of the underlying dispute. If an aggrieved party chooses ADR as a first option, a neutral party designated by the program will attempt to facilitate a mutually agreeable resolution. The neutral party must not have participated in any previous decisions concerning the issue in dispute. ADR is confidential, non-binding, and informal. No communications or proceedings of ADR may be referred to at the grievance hearing or arbitration stages. The neutral party may not participate in subsequent proceedings.

If ADR is chosen by the aggrieved party, the deadlines for convening a hearing and of a hearing decision, 30 and 60 days respectively, are held in abeyance until the conclusion of ADR. At the initial session of ADR, the neutral party must provide written notice to the aggrieved party of his or her right to request a hearing. If ADR does not resolve the matter within 30 calendar days, the neutral party must again notify the aggrieved party of his or her right to request a hearing. At any time, the aggrieved party may decline ADR and proceed directly to the hearing process.

### **B. GRIEVANCE HEARING**

An aggrieved party may request a grievance hearing without participating in ADR or, if ADR is selected, if it fails to result in a mutually agreeable resolution. The aggrieved party should make a written request for a hearing to [the designated program supervisor or director]. A request for a hearing must be made within one year after the date of the alleged occurrence. At the time a request for a hearing is made, the program should make available to the aggrieved party information that it relied upon in its disciplinary decision. The program will arrange for one or more pre-hearing conferences at a time mutually convenient to the parties. Pre-hearing conferences are not a substitute for a hearing. They are intended to facilitate a mutually agreeable resolution of the matter to make a hearing unnecessary or to narrow the issues to be decided at the hearing. The format of the pre-hearing conference may be flexible, involving

meetings with one party at a time and/or with both parties together. Pre-hearing conferences are conducted by [program supervisor/director A].

The hearing will be conducted by [program supervisor/director B]. The person conducting the hearing may not have participated in any previous decisions concerning the issue in dispute. (Note: To ensure impartiality in the hearing, programs may choose to designate someone other than the program director to approve disciplinary actions regarding members, leaving the director available to conduct grievance hearings.) A hearing must be held no later than 30 calendar days after the filing of the grievance, and a written decision must be made no later than 60 calendar days after filing.

### **C. BINDING ARBITRATION**

An aggrieved party may request binding arbitration if a grievance hearing decision is adverse or if no decision is made within 60 days of the filing of the grievance. The arbitrator must be independent and selected by agreement of the parties. If the parties cannot agree on an arbitrator, the Corporation's Chief Executive Officer will appoint one within 15 calendar days after receiving a request from one of the parties.

An arbitration proceeding will be held no later than 45 calendar days after the request for arbitration, or no later than 30 calendar days after the appointment of an arbitrator by the Corporation's CEO. An arbitration decision will be made no later than 30 calendar days after the commencement of the arbitration proceeding.

The cost of arbitration will be divided evenly between the parties, unless the aggrieved party prevails, in which case the program will pay the total cost of the proceeding as well as the prevailing party's attorneys' fees.

### ***Model Member Evaluation***

*(This is provided only as guidance. Please customize for your program)*

***\* Note: Final evaluation must include total number of hours completed by the member.***

## Montana Technology Corps AmeriCorps Member Performance Evaluation

AmeriCorps Member: \_\_\_\_\_ Site: \_\_\_\_\_

Supervisor: \_\_\_\_\_ Date: \_\_\_\_\_ Mid Term  End Term

*AmeriCorps member development is an important goal of the Montana Technology Corps. Without honest feedback, members are unable to make improvements to enhance their performance and their experience. Performance Evaluations are intended to be a mutual exchange of information, enabling members to progress toward their optimal performance potential. Therefore, providing candid responses is very important.*

*The following competencies have been identified as areas in which members can continually strive to better themselves. Using the scales provided below, please evaluate the member based on her/his day-to-day performance and your observations as the Site Supervisor. Corps Members, choose the rating area that you feel best describes your work performance.*

<b>Ratings of AmeriCorps members are based on the criteria listed below: (Please Mark: 'E' for Excellent, 'G' for Good, 'F' for Fair, and 'P' for Poor)</b>		Supervisor	Member
1.	Demonstrates knowledge and preparation to provide technology training effectively		
2.	Fills out and submits all relevant paperwork in a timely manner		
3.	Sets realistic goals and follows through with commitments		
4.	Honors time commitments, and demonstrates time/priority management skills		
5.	Utilizes feedback and constructive criticism		
6.	Represents the program professionally		
7.	Shows initiative and self-motivation		
8.	Demonstrates decision-making and organizational skills		
9.	Maintains a constructive and mature attitude throughout challenges		
10.	Demonstrates resourcefulness in generating solutions to problems		
11.	Accepts personal responsibility for learning and contributing		
12.	Interacts appropriately with on-site personnel, clientele, or public		
13.	Creative and/or resourceful in problem-solving		
14.	Demonstrates concern for the quality, accuracy, and completeness of tasks performed		

Site Supervisor's narrative evaluation:

AmeriCorps Member's self evaluation:

\_\_\_\_ I agree with this evaluation    \_\_\_\_ I do not agree with this evaluation

Comments:

Member's Signature \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## ***Model Member Timesheet***

*(This is provided only as guidance. Please customize for your program)*

### **Member Service Hours and Time Logs**

Programs must track member hours carefully. Time logs of service must adhere to the following rules and be maintained in each members' file.

- *Programs may allocate **no more than 20 percent** of member service hours to training, education, member development and other non-direct service activities.*
- *AmeriCorps members may spend **no more than ten percent** of their term of service performing fund raising activities.*
- *Time logs must break out member hours by these categories – direct service activities, education and training and fundraising – even if a member's service position description does not contain fund raising assignments. Please remember that the Commission requires that, as an aggregate, 50% of member activities are direct service.*
- *Time logs must be signed and dated by the member and the site supervisor.*
- *Time logs must not contain whiteout. Corrections should be done by drawing a single line through the error and writing the correction next to it. Each change needs to be initialed and dated by the member and site supervisor.*
- *Program staff must check the addition and totals on all time logs to verify that they are correct. Changes to totals must be sent back to the member and supervisor for initials.*
- *Time logs must be completed in ink.*

# MONTANA CAMPUS CORPS

## MEMBER TIMESHEET

*For MTCC Use  
Only*

Roster      WBRB

MEMBER: \_\_\_\_\_

CAMPUS: \_\_\_\_\_

MONTH: \_\_\_\_\_ YEAR: \_\_\_\_\_

		Sun	Mon	Tues	Wed	Thurs	Fri	Sat	TOTAL
<i>Week 1</i> <i>Dates:</i>	<b>Service:</b>								
	<b>Training:</b>								
	<b>Fundraising</b>								
<i>Week 2</i> <i>Dates:</i>	<b>Service:</b>								
	<b>Training:</b>								
	<b>Fundraising</b>								
<i>Week 3</i> <i>Dates:</i>	<b>Service:</b>								
	<b>Training:</b>								
	<b>Fundraising</b>								
<i>Week 4</i> <i>Dates:</i>	<b>Service:</b>								
	<b>Training:</b>								
	<b>Fundraising</b>								
<i>Week 5</i> <i>Dates:</i>	<b>Service:</b>								
	<b>Training:</b>								
	<b>Fundraising</b>								
								<b>Service Hours</b>	

<b>Training Hours</b>	
<b>Fundraising Hours</b>	
<b>Total Hours</b>	

**\*\* "Service" must be at least 50% of the total hours served in a term, "Training" should be no more than 20%, and "Fundraising" should be no more than 10% of the total hours during a term of service. \*\***

**Reviewed by Member: Signature: \_\_\_\_\_ Date: \_\_\_\_\_**

***Reviewed by Campus Supervisor/Site Supervisor: \_\_\_\_\_ Date:***

\_\_\_\_\_

*Specific Activities you worked on this month:*

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